



Journyx ProjectXecute ver 8.9_01

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Journyx ProjectXecute User Manual

Journyx® Timesheet™ Version 8.9

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Configuration

System Settings

System Settings are found under Configuration→System Settings. These settings apply to the entire system.

System Information

The System Information page displays the basic specifications of your ProjectXecute installation (see figure 8.1). On this page you can see the current version of the product along with the expiration date and the current date. You can also view the total number of users the license allows, how many users are presently logged in, and how many users are presently active in the system. An active user is one that is counted against the license.

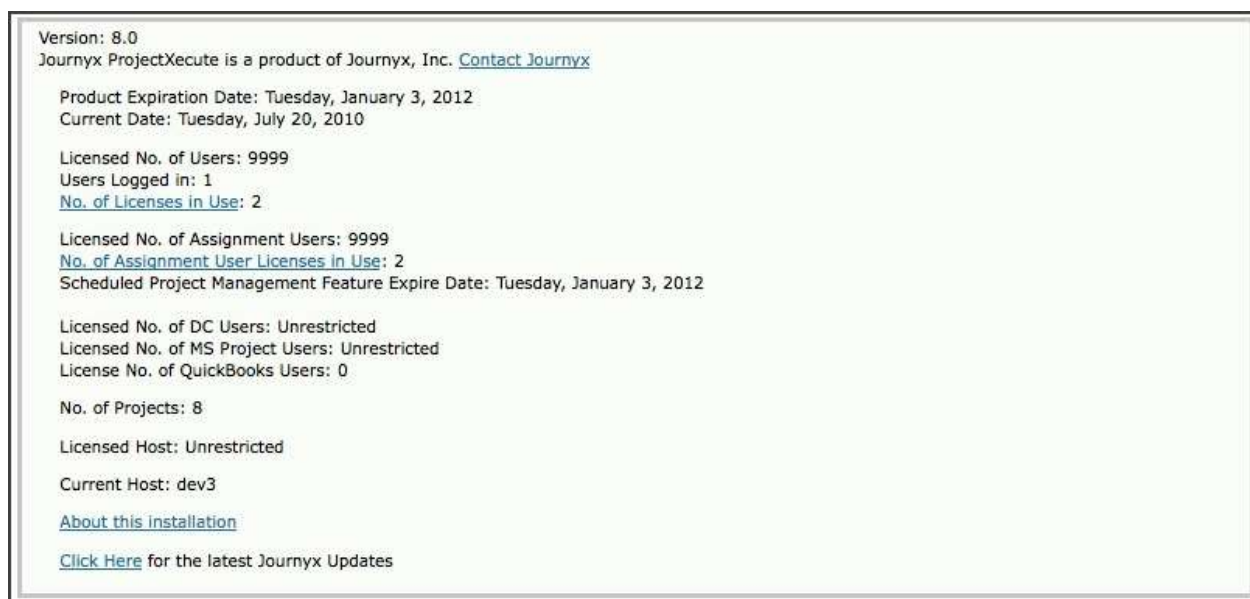


Figure 8.1. System Information

If ProjectXecute modules were purchased, you will be able to view how many user licenses you have for Disconnected Users, Projectlink, and Accountlink. These modules are all sold separately.

This page also includes the number of projects in the system, the current host server, and licensed host server.

At the bottom of the System Information page, the link labeled 'About this installation' will take you to a page containing additional information about the installation as well as the contact information for Journyx (see figure 8.2).

About this installation

Journyx ProjectXecute Version 8.0

*Thank you for using our product. Get the latest news on **Journyx ProjectXecute** and learn about our other products at www.Journyx.com*

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License Key Data

- **Dates**
 - **Install Date:** Mon Jun 28 14:28:06 CDT 2010
 - **Product Expiration Date:** Tuesday, January 3, 2012
 - **Current Date:** Tuesday, July 20, 2010
- **Users**
 - **Licensed Number of Users:** 9999
 - **Licensed Number of Timekeepers:** 9999
- **Hosts**
 - **Licensed Host:** Unrestricted
 - **Current Host:** dev3

Operating System Information

- **Current:** Linux dev3.int.journyx.com 2.6.9-5.ELsmp #1 SMP Wed Jan 5 19:30:39 EST 2005 i686
- **Original:** Linux dev3.int.journyx.com 2.6.9-5.ELsmp #1 SMP Wed Jan 5 19:30:39 EST 2005 i686 i686 i386 GNU/Linux

Credits

- **Design and enhancement ideas:** literally thousands of registered users just like [you](#).
- **Help from our friends:** [The Open Source Community \(Licenses and Copyrights\)](#).

Figure 8.2. About this installation

This page includes detailed information about the license key data such as the install date, product expiration date, the current date, total licensed users, total licensed users who can have the Timekeeping role, the licensed host server, and the current host server. You can also view and compare the current operating system with the operating system upon initial install of ProjectXecute. The Credits section contains links to the Journyx website form for requesting new product features, as well as access to open source licenses and copyrights related to Journyx products.

Entry Sheets

Entry Sheet Settings allow you to configure preferences for users' timesheets, expense sheets and mileage sheets. This section is comprised of Global Settings, Timesheet Settings, Mileage Sheet Settings, and Expense Sheet Settings. Global Settings contain preferences that will affect all users' timesheets, mileage sheets, and expense sheets.

Global Settings

Global Settings

- ☒ Allow users to modify Memorized Entries
- ☒ Allow users to automatically generate current entries based on entries from prior periods
- ☐ For monthly users, look back for previous entries by weeks instead of months
- ☒ Allow users to create entries with empty (blank) comments

Number of entry rows that trigger date display across bottom of grid (min. 3):

Project Notes associated with entry records can be modified:

Default comment for all sheets:

"Project" hierarchical entry field name:

Figure 8.3. Global Settings

Allow users to modify Memorized Entries

This option allows users to modify memorized entries that have been assigned to them by managers or administrators.

Allow users to generate current entries based on entries from prior periods

Users may work on certain short-term projects over the duration of several periods. This option will allow users to automatically create current entries from project tasks that were logged during prior periods. These are not 'permanent' Memorized Entries. An entry will cease to be carried over to a future period when it goes unused in the current period.

For monthly users, look back for prior period entries by weeks instead of months

This option is related to the previous option that will allow users to automatically create current entries from time entries that were logged during prior periods. Users have the option to pull current entries from up to 4 periods in the past. However, this option allows users assigned to monthly time periods to set the look back period for weeks instead of periods because of the length of the assigned monthly period.

Allow users to create entries with empty (blank) comments

This option does not force users of the system to specify a comment for each time entry, expense entry, or mileage entry. If comments for each entry are not critical to your organization, you should check this option.

Number of entry rows that trigger date display across bottom of grid (min. 3)

This option allows you to specify the minimum number of entries in a user's sheet that will trigger the date to be shown at the bottom of the sheet. Dates are already shown by default at the top of all entry screens. However, when users have a significant number of entries in their sheets, they tend to lose sight of the dates when scrolling down. Setting the dates to display at the foot of the sheet allows users to see the dates associated with each entry field.

Project Notes associated with entry records can be modified

This option allows you to decide when project notes can be modified. 'Always' will allow the note to be modifiable regardless of the state of the record or sheet. 'Never' will never allow the note to be modified once created. 'Depends on the state of the record' will only allow the note to be modified when the record is in particular states. For this last option, if the record is in a status of 'open' or 'rejected', the project note can be modified. If the record is in a status of 'submitted' or 'approved', the project note will not be modifiable.

Default comment for all sheets

This option allows you to specify a default comment that will appear on every entry of users' timesheets, expense sheets, and mileage sheets. Users will still have the ability to modify the comment.

"Project" hierarchical entry field name

'Project' is the default name suggested for this hierarchical tracking field. You may specify a different name for the Project field. The new name will be displayed in place of Project on users' timesheets, expense sheets, and mileage sheets.

Timesheet Settings

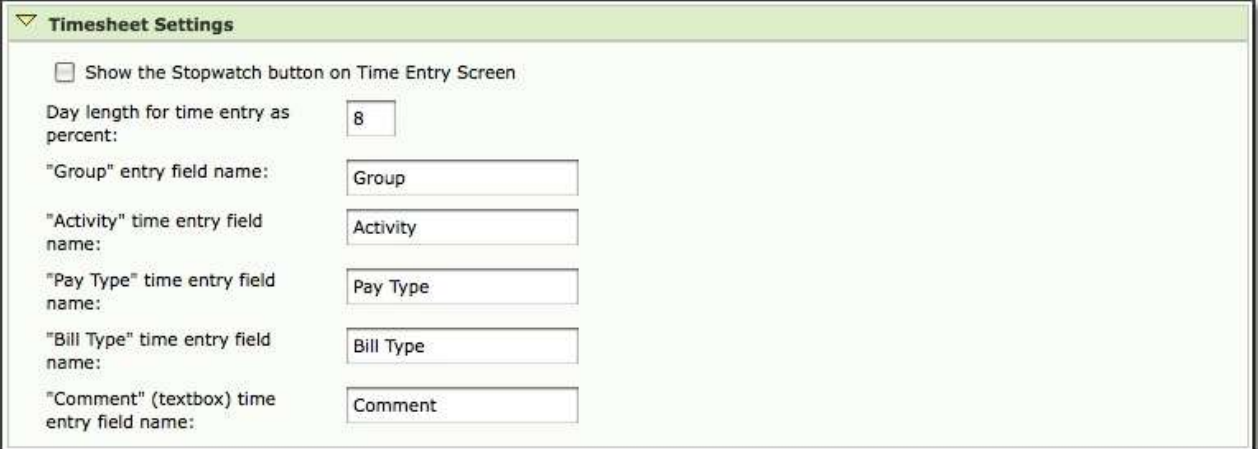


Figure 8.4. Timesheet Settings

Show the Stopwatch button on the time entry screen

This option will display the Stopwatch button on users' timesheets which they can click to track the commencement and completion of a task.

Length of workday for time entry as percent

This option allows you to define your company's workday and is designed for users that are entering their time as a percentage of the workday on their timesheets. Hence, if the workday for your organization is defined as 10 hours and a user works 5 hours on a project, he/she would input 50% for that entry in his/her timesheet.

"Group" time entry field name

'Group' is the default name suggested for this tracking field that may be included in timesheets. You may specify a different name for the Group field. The new name will be displayed in place of 'Group' on users' timesheets when they track time for projects.

"Task" time entry field name

'Task' is the default name suggested for this tracking field that may be included in timesheets. You may specify a different name for the Task field. The new name will be displayed in place of 'Task' on users' timesheets when they track time for projects.

"Pay Type" time entry field name

'Pay Type' is the default name suggested for this tracking field that may be included in timesheets. You may specify a different name for the Pay Type field. The new name will be displayed in place of 'Pay Type' on users' timesheets when they track time for projects.

"Bill Type" time entry field name

'Bill Type' is the default name suggested for this tracking field that may be included in timesheets. You may specify a different name for the Bill Type field. The new name will be displayed in place of 'Bill Type' on users' timesheets when they track time for projects.

"Comment" time entry field name

'Comment' is the default name suggested for the textbox on timesheets. You may specify a different name for the Comment field. The new name will be displayed in place of 'Comment' on users' timesheets when they track time for projects.

Expense Sheet Settings

A screenshot of a software dialog box titled "Expense Sheet Settings". The dialog has a light green header bar with a small downward-pointing triangle icon on the left. Below the header, there are four rows of settings. Each row consists of a label on the left and a text input field on the right. The labels are: "Expense Code" expense entry field name:", "Source" expense entry field name:", "Currency" expense entry field name:", and "Comment" (textbox) expense entry field name:". The text input fields contain the default values: "Expense Code", "Source", "Currency", and "Comment".

Expense Sheet Settings	
"Expense Code" expense entry field name:	Expense Code
"Source" expense entry field name:	Source
"Currency" expense entry field name:	Currency
"Comment" (textbox) expense entry field name:	Comment

Figure 8.5. Expense Sheet Settings

"Expense Code" expense entry field name

'Expense Code' is the default name suggested for this tracking field that may be included in expense sheets. You may specify a different name for the 'Expense Code' field. The new name will be displayed in place of 'Expense Code' on users' expense sheets when they track expenses for projects.

"Source" expense entry field name

'Source' is the default name suggested for this tracking field that may be included in expense sheets. You may specify a different name for the 'Source' field. The new name will be displayed in place of 'Source' on users' expense sheets when they track expenses for projects.

"Currency" expense entry field name

'Currency' is the default name suggested for this tracking field that may be included in expense sheets. You may specify a different name for the Currency field. The new name

will be displayed in place of 'Currency' on users' expense sheets when they track expenses for projects.

"Comment" expense entry field name
'Comment' is the default name suggested for the textbox on expense sheets. You may specify a different name for the Comment field. The new name will be displayed in place of 'Comment' on users' expense sheets when they track expenses for projects.

Mileage Sheet Settings

 Mileage Sheet Settings

"Reason" mileage entry field name:

"Vehicle" mileage entry field name:

"Measurement" mileage entry field name:

"Comment" (textbox) mileage entry field name:

Figure 8.6. Mileage Sheet Settings

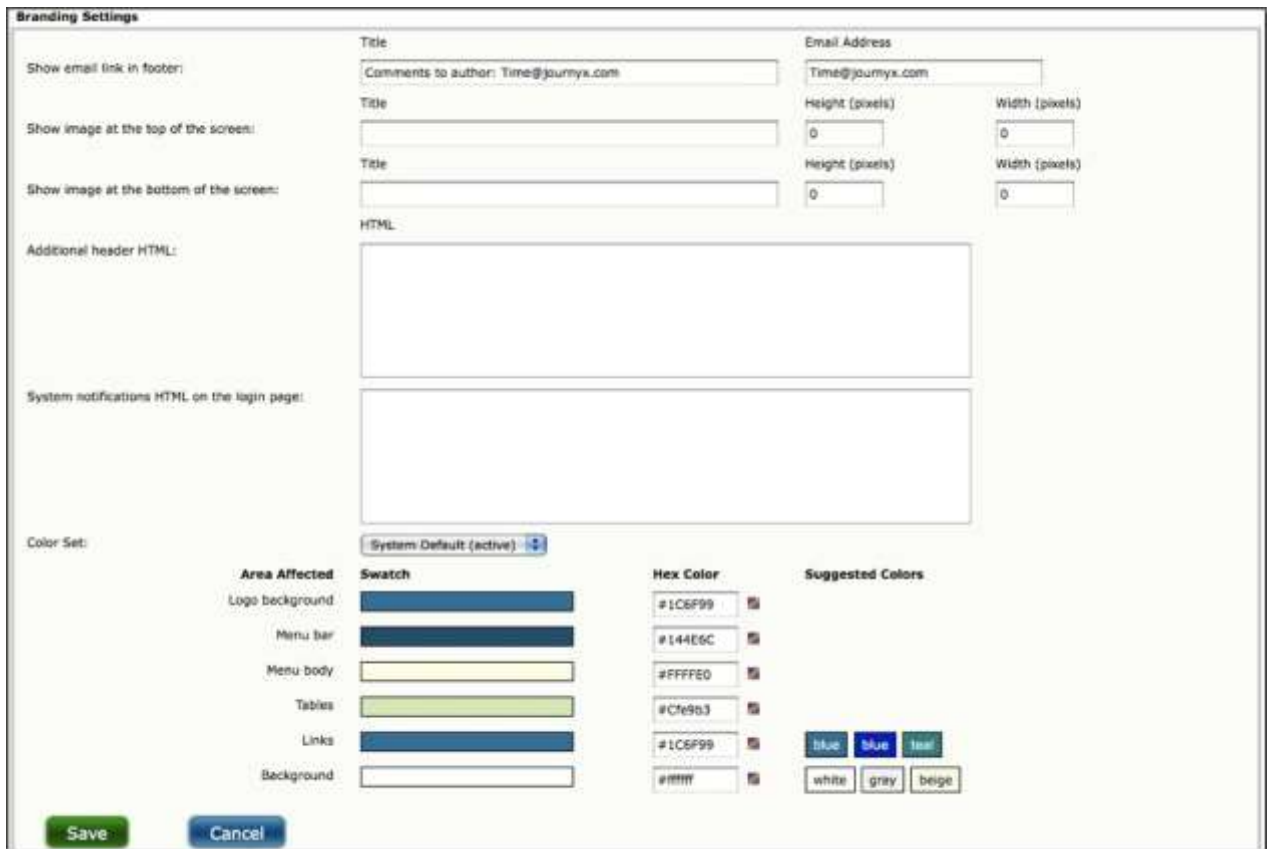
"Measurement" mileage entry field name
'Measurement' is the default name suggested for this tracking field that may be included in mileage sheets. You may specify a different name for the Measurement field. The new name will be displayed in place of 'Measurement' on users' mileage sheets when they track mileage for projects.

"Vehicle" mileage entry field name
'Vehicle' is the default name suggested for this tracking field that may be included in mileage sheets. You may specify a different name for the Vehicle field. The new name will be displayed in place of 'Vehicle' on users' mileage sheets when they track mileage for projects.

"Reason" expense entry field name
'Reason' is the default name suggested for this tracking field that may be included in mileage sheets. You may specify a different name for the Reason field. The new name will be displayed in place of 'Reason' on users' mileage sheets when they track mileage for projects.

"Comment" expense entry field name
'Comment' is the default name suggested for the textbox on mileage sheets. You may specify a different name for the Comment field. The new name will be displayed in place of 'Comment' on users' mileage sheets when they track mileage for projects.

Branding



The **Branding Settings** dialog box is used to configure the visual and functional aspects of the Journyx Timesheet application. It includes sections for email links, image placement, HTML content, and a color palette.

Show email link in footer: This section allows users to enable a link in the footer. The **Title** field is set to "Comments to author: Time@journyx.com" and the **Email Address** field is set to "Time@journyx.com".

Show image at the top of the screen: This section allows users to display an image at the top of the screen. It includes fields for **Title**, **Height (pixels)**, and **Width (pixels)**, all of which are currently set to 0.

Show image at the bottom of the screen: This section allows users to display an image at the bottom of the screen. It includes fields for **Title**, **Height (pixels)**, and **Width (pixels)**, all of which are currently set to 0.

Additional header HTML: This section provides a text area for additional HTML code to be added to the header.

System notifications HTML on the login page: This section provides a text area for HTML code to be added to the login page.

Color Set: This section allows users to select a color set. The **System Default (active)** is selected. Below this, there is a table of color swatches and their corresponding hex codes.

Area Affected	Swatch	Hex Color
Logo background	[Blue Swatch]	#1C6F99
Menu bar	[Dark Blue Swatch]	#144E6C
Menu body	[Yellow Swatch]	#FFFFE0
Tables	[Light Green Swatch]	#C7E9B3
Links	[Dark Blue Swatch]	#1C6F99
Background	[White Swatch]	#FFFFFF

Below the table, there are buttons for **Save** and **Cancel**. To the right of the hex codes, there are buttons for **Suggested Colors**, including **blue**, **white**, **gray**, and **beige**.

Figure 8.7. Branding Settings

Show email link in footer

This option allows you to display an email address at the bottom of all pages that users can click on, launching their default email system such as Outlook or Outlook Express. Typically, organizations prefer to use the custom email link to allow users to contact the system administrator. The link title is the text that will be displayed as a link. The default title that will be shown to users is 'Comments to author: Time@journyx.com'. The email address is the actual recipient to whom the email will be sent. This must be a full and valid email address. The default email address is time@journyx.com. You can specify a different email address for the recipient in the Email Address textbox.

Show image at the top of the screen

This option allows you to display an image at the top of all pages. The image must be in GIF or JPEG format. You must specify the URL address where the image is located. The address must be a complete URL and needs to include the scheme name 'http://'. Additionally, this value must not be a UNC path as used by some Windows environments. You must also specify the pixel dimensions of the image in the Height and Width textboxes. It is best that you specify the exact dimensions of the image itself to avoid any distortion. Alternatively, you may specify a dimension of '0' to use the image's default size. If the actual image display is too large or too small when displayed on the pages, it is best that you resize the original image using photo-editing software.

Show image at the bottom of the screen

This option allows you to display an image at the bottom of all pages. The image must be in GIF or JPEG format. You must specify the URL address where the image is located. The address must be a complete URL and needs to include the scheme name 'http://'. Additionally, this value must not be a UNC path as used by some Windows environments. You must also specify the pixel dimensions of the image in the Height and Width textboxes. It is best that you specify the exact dimensions of the image itself to avoid any distortion. Alternatively, you may specify a dimension of '0' to use the image's default size. If the actual image display is too large or too small when displayed on the pages, it is best that you resize the original image using photo-editing software.

Additional header HTML

This option allows you to place custom HTML at the top of every page. This is an advanced feature that could potentially affect the layout or functionality within the page. This field accepts plain text and HTML tags.

Additional HTML on login page

This option allows you to place custom HTML on the login page. This is an advanced feature that could potentially affect the layout or functionality of the login page.

Color set

You can select from one of the pre-defined color sets that uses complimentary colors to define the graphical layout of the pages. After selecting a pre-defined color set, you can see the assigned colors for the various areas that will be visually affected. After selecting a pre-defined color set, you can click the Save button to change the layout of all the pages. Alternatively, you can create your own color set by assigning colors to the various affected areas. Clicking the Color Grid icon located to the right of the hex values will load a color swatch from which you can select a color for that specific area. When finished selecting colors or assigning hex values to the areas affected, specify a name for the color set and click the Save with new Color Set name button. This will change the layout of all the pages to the colors that you specified. Also, the name of the color set that you created will be displayed in the Color Set dropdown.

Screen Appearance

Screen Appearance Settings

Configuration → System Settings → Screen Appearance

Screen Appearance Settings

Default short date format: ex: 04/12/2013

Default long date format: ex: Friday, April 12, 2013

Currency symbol for Rate Reports:

☐ Force 1-to-1 Mileage or Currency conversions if there are no conversions available.

☒ Use word wrap in Project Notes

Default number of search results to show per screen:

Maximum number of items in a selection drop down. Overrides larger numbers that users may specify (min: 1):

Maximum number of assignments to show in an assignment allocation graphic without summarizing assignments:

Navigation Options

☒ Show roles in login bar when hovering over user name

☒ Allow the Calendar above the menu

Enter the text label for a Custom Link in the login bar:

Enter the URL for the Custom Link:

Figure 8.8. Screen Appearance Settings

Default short date format

This option determines the short date format that will be displayed throughout the application. 'MM' is the 2-digit month, 'DD' is the 2-digit date, and 'YYYY' is a 4-digit year. The default is MM/DD/YYYY.

Default long date format

This option determines the long date format that will be displayed throughout the application. The long day format will spell out the month and day. 'dddd' is the day of the week, 'MMMM' is the month, 'dd' is the 2-digit date, and 'yyyy' is a 4-digit year. For example, the long day format of 'dddd, MMMM dd, yyyy' will display 'Tuesday, January, 14, 2005'.

Currency symbol for Rate Reports

This option allows you to specify which currency symbol (£, ¥, \$) will be used in the Rate Reports generated by the Rate Rules & Policies module. The default value for this option is \$. To change this option, you will need to use either the HTML standard script ('Pound' = £ 'Yen' = ¥) or Windows character map to copy and paste the desired symbol into this field.

Force 1-to-1 Mileage or Currency conversions if there are no conversions available

This option allows you to run expense and mileage reports with conversions when not all of entries have active conversions applied to them. When an entry is not subject to a conversion rate, the original amount of the entry is shown.

Use word wrap in Project Notes

This option will wrap text when users input Project Notes directly or via Entry Field Notes from entry sheets themselves. You may want to disable this setting if you plan to copy and paste code that will not display properly with word wrap in Project Notes.

Default number of search results to show per screen

This option determines the default number of search results to display on a single page at a time. This number of search results will be applied to all screens that contain search results. The user will still have the ability to modify and override the number of results to be shown on a page.

Maximum number of items in a selection dropdown. Overrides larger numbers that users may specify (min. 1)

This option allows you to set the maximum number of items that can be displayed within the dropdowns in users' timesheets, expense sheets, and mileage sheets. Performance and load time can be significantly affected by this setting. Users have the ability to specify this value within their individual Preferences section. However, if the user-specified value is larger, this administrative setting will override the user-specified value.

Maximum number of assignments to show in an assignment allocation graphic without summarizing assignments

This option allows you to add text summaries of assignments to the allocation bar graphs on assignment management screens when the number of assignments reaches your defined threshold. This is helpful when a task includes so many assignments that it is difficult to click on an individual assignment in its bar graph.

Navigation Options



Navigation Options

☒ Show roles in login bar when hovering over user name

☒ Allow the Calendar above the menu

Enter the text label for a Custom Link in the login bar:

Enter the URL for the Custom Link:

Figure 8.9. Navigation Options

Show roles in login bar when hovering over user name

This option will display the respective roles that have been assigned to each user in the login bar.

Allow the calendar above the menu

This option will display a calendar in the login bar, which allows users to visually select dates when managing their time, expense, and mileage.

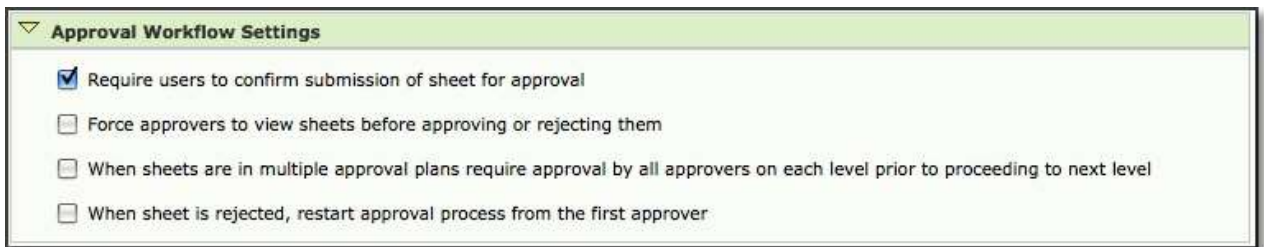
Enter the text label for a Custom Link in the login bar/Enter the URL for the Custom Link

This option allows you to create a Custom Link that will be displayed in the users' login bar and will allow them to link to the designated site. The link title is the text that will be displayed for the link from the login bar. The URL is the actual website address where the users will be directed. Typically, organizations prefer to use the Custom Link for

company intranets, corporate websites, or debugging and reporting to web-based third-party products.

Approvals and Auditing

Approval Workflow Settings



Approval Workflow Settings

- ☒ Require users to confirm submission of sheet for approval
- ☐ Force approvers to view sheets before approving or rejecting them
- ☐ When sheets are in multiple approval plans require approval by all approvers on each level prior to proceeding to next level
- ☐ When sheet is rejected, restart approval process from the first approver

Figure 8.10.1. Approval Workflow Settings

Require users to confirm submission of sheet for approval

This option will require users to undergo an additional confirmation step via a pop-up window when attempting to submit a sheet for approval.

Force approvers to view sheets before approving or rejecting them

This option will require approvers to click on the period link for sheets awaiting approval under the Approvals tab and require the approver to view the sheet prior to approving or rejecting it.

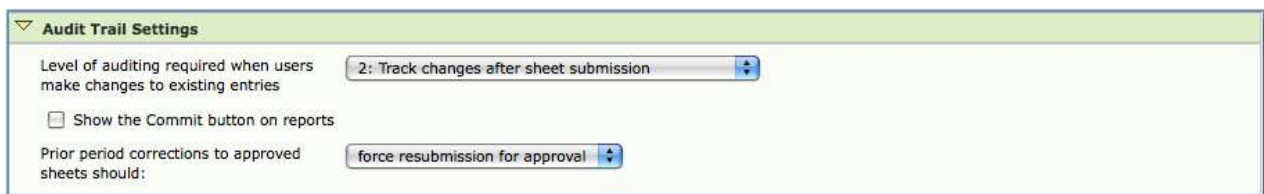
When sheets are in multiple approval plans, require approval by all approvers on each level prior to proceeding to next level

If a user's sheet is assigned to multiple Approval Plans, this option will require approval at each tier within each Approval Plan before proceeding onward to the next tier of approvers. Hence, all primary approvers must first approve the sheet before it can proceed to the secondary approvers, and so forth.

When sheet is rejected, restart approval process from the first approver

If a sheet is rejected at any level in the period approval process, this option will force the sheet to begin the approval process over again with the first approver.

Audit Trail Settings



Audit Trail Settings

Level of auditing required when users make changes to existing entries: 2: Track changes after sheet submission

☐ Show the Commit button on reports

Prior period corrections to approved sheets should: force resubmission for approval

Figure 8.10.2. Audit Trail Settings

Level of auditing required when users make changes to existing entries

This option determines what happens to an existing entry on a user's Time, Expense, or Mileage entry when a change is made. There are five levels available:

Level 1 - changes to existing records will not be tracked. Changes on a sheet will change the record in the database, retaining only the timestamp and user ID for the last modification.

Level 2 - changes will be tracked only after a sheet has been submitted. If a sheet has ever been submitted for approval (regardless of its current state), any change to an existing row on a user's sheet will cause one or more new corrective records to be created, rather than modifying an existing record in the database.

Level 3 - similar to level 2, in that corrections are enforced only after a sheet has been submitted. For level 3, however, an existing entry cannot be modified at all without an additional correction note being added to the entry. Correction notes are similar to diary notes, and each change requires such a note.

Level 4 - like level 2, but corrections are made any time a record is changed.

Level 5 - like level 3, but correction notes are required at all times when records are changed.

For more information on corrective records, see the *Time Entry Corrections* section in this manual.

Show the Commit button on reports

This option determines whether or not individual records can be approved or "committed" in reports outside of a workflow approval process. Showing the Commit button in reports is not recommended if you use Period or Project Approval Plans.

Prior period corrections to approved sheets should:

The 'force resubmission for approval' option will cause the system to require that any corrections go back through the approval process. The 'be added as approved entries' option will cause the system to automatically add the corrections as approved records, with no requirement for the sheet to go back through the approval process. The 'not be allowed' option will cause the system to disallow corrective entries to approved sheets altogether. Both 'allowed' versions of this feature include tracking who makes corrections and when in the Sheet History system notes.

Approval Email Settings

Approval Email Settings

☐ Activate approval emails and send daily at 00:00 (hh:mm)

☒ Compile all backup and approver late notices into a single email

Do not process notification emails for sheets before: 08/18/1972

☒ Automatically generate sheets for users to trigger late email notifications

Figure 8.11. Approval Email Settings

Activate approval emails and send daily at a particular time

This option sets the time for sending out automatically generated emails related to Approval Plans. The contents of the emails are managed as part of the Approval Plan.

Please see the Approval Plans section of this manual for more information on automated email notifications. Keep in mind that this setting only applies to 'cron' emails. In other words, this setting only applies to approval emails that are triggered by a chronological limit. For example, if a user is x number of days late submitting his sheet for approval. Action-based emails are unaffected by this setting because they are always triggered and sent when a specific action has been committed.

Compile all backup and approver late notices into a single email

Instead of receiving an email notification for each user who is late submitting timesheets, this option compiles all notifications into a single email, which is then submitted to the respective approver(s) or backup approver(s).

Do not process notification emails for sheets before a particular date

This date is the historical cutoff date for automated emails related to Approval Plans. The system will not send emails regarding any sheet that covers a period before this date. The default value for this field is August 18, 1972. Keep in mind that this setting only applies to 'cron' emails. In other words, this setting only applies to approval emails that are triggered by a chronological limit. For example, if a user is x number of days late submitting his sheet for approval. Action-based emails are unaffected by this setting because they are always triggered and sent when a specific action has been committed.

Automatically generate sheets for users to trigger late email notifications

Approval Plan reminders can only be automatically generated if the user has an existing sheet for the period. If for whatever reason a user has not created a sheet (i.e., he/she hasn't logged in during the period), the user will not receive any reminder emails. By checking this option, the system will automatically create a sheet for the current period so that Approval Plan email reminders can be sent to the user if he/she has not fully completed the sheet.

Approval email format

This option determines the format of the automatically generated emails related to Approval Plans. You can select either text format or HTML format.

URL for links inside approval emails

This option allows you to specify a URL for users who require access to the system through any special gateway.

Server and Email Settings

Email Server Settings

Figure 8.12. Email Server Settings

Outgoing email server type

This is where you select the type of connection used by your mail server. You can obtain this information from your IT staff or email server administrator. Your choices are:

- **SMTP** - Unsecured classic SMTP: usually port 25
- **SMTP over SSL** - SSL (Secure Socket Layer): usually port 465
- **SMTP over TLS** - TLS (Transport Layer Security): usually port 587. Also called "STARTTLS"

If you use SSL or TLS you may also need to set an account name, password and/or client certificate and key files depending on the mail server's settings.

We recommend using either SSL or TLS for maximum security. If you're using classic (unsecured) SMTP please be aware that any passwords and email text will be transmitted in plaintext and can be intercepted. If your server requires passwords you should use SSL or TLS if available. When you select a choice from this menu the suggested port will be automatically filled in for you but you can override the port.

SMTP (outgoing) email server

This is the hostname or IP address of the server that the system will use for automated email notifications. There must be a valid server specified in order for automated email notifications to work properly.

SMTP (outgoing) email server port

This is the port number for the outgoing email server. Find this from your IT staff or email server administrator. Typical port settings are:

- SMTP: usually port 25
- SMTP over SSL: usually port 465
- SMTP over TSL: usually port 587

Account name for outgoing mail server, if any

This is the account name used to authenticate to the outgoing email server. Some servers require a username/password to send mail. If your server requires a username/password it is recommended to use either SSL or TLS encryption if available.

Account password for outgoing mail server, if any

This is the account password used to authenticate to the outgoing email server. Some servers require a username/password to send mail. If your server requires a username/password it is recommended to use either SSL or TLS encryption if available.

Server path to private key for outgoing mail server if required:

If your mail server requires a private key to authenticate, you can put the path to the key file here. This setting should be blank if your server doesn't use key files. If set this must be the complete path to a file on the server readable by the web user. If you're not sure where to put the file you can put it in the installation directory (\$WTHOME).

Server path to private certificate for outgoing mail server if required:

If your mail server requires a private key certificate to authenticate, you can put the path to the certificate file here. This setting should be blank if your server doesn't use certificate files. If set this must be the complete path to a file on the server readable by the web user. If you're not sure where to put the file you can put it in the installation directory (\$WTHOME).

'From' address for email sent by the system

This address will appear as the 'From' address when recipients view emails sent by the system.

Number of seconds to wait before giving up on a mail server connection

This is the maximum amount of time, in seconds, that the system will wait for a response from the mail server before timing out. You may set this option to '0' to force the system never to timeout when waiting on a response from the SMTP server. The default value for this option is 30 seconds.

Miscellaneous Settings



Miscellaneous Settings	
Fully qualified domain name of this server:	dev3.int.journyx.com
Preferred email format:	Text
Alternate prefix for links inside email notifications:	
Maximum number of rules that can be in a policy (max. 30):	12
Number of remaining license seats under which a warning message is generated on management screens	5

Figure 8.13. Miscellaneous Settings

Fully qualified domain name of the server

This is the actual domain name of the system server. The name is required by the MSP Sync utility and other SOAP interface functionality. If the system is unable to determine this value, you may be asked by the Journyx Professional Services Team to modify the value. Otherwise it is recommended that you do not modify this value.

Preferred email format

This setting determines the format of emails sent by the Journyx system. The format choices are text, HTML or both. The text option always sends emails in plain text format. The HTML option always sends emails in HTML format, and the both option sends in HTML format unless the user's email reader only supports text.

Fully qualified domain name of the server

This is the actual domain name of the system server. The name is required by the MSP Sync utility and other SOAP interface functionality. If the system is unable to determine this value, you may be asked by the Journyx Professional Services Team to modify the value. Otherwise it is recommended that you do not modify this value.

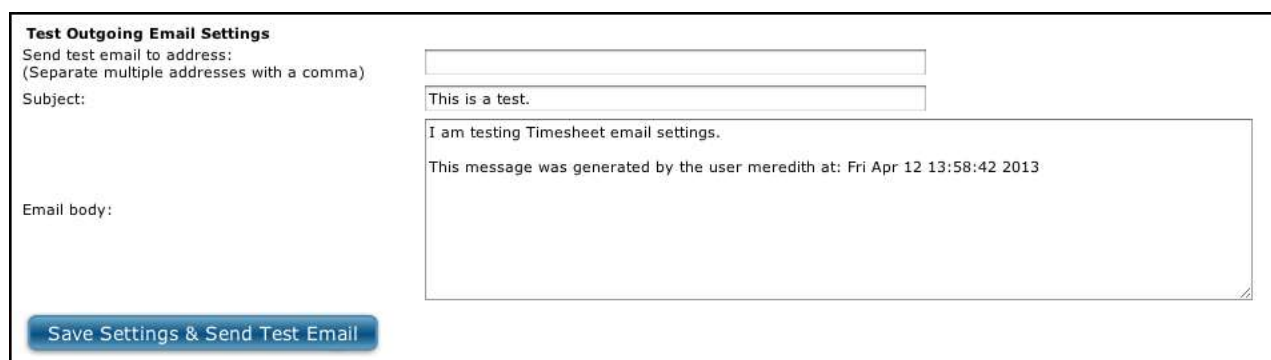
Alternate prefix for links inside email notifications

This option provides a method for customizing links back to the system that can be included in emails. This setting can be used to show a URL with a redirect to the Journyx server.

Number of remaining license seats under which a warning message is generated on management screens

This option determines when administrators will see notices on management screens that warn you when you are close to using all of your license seats.

Test Outgoing Email Settings



Test Outgoing Email Settings

Send test email to address:
(Separate multiple addresses with a comma)

Subject:

Email body:

This is a test.

I am testing Timesheet email settings.

This message was generated by the user meredith at: Fri Apr 12 13:58:42 2013

Save Settings & Send Test Email

Figure 8.13b Test Outgoing Email Settings

This feature allows you test your email settings and confirm that you have the Journyx system set up properly for handling email notifications.

Leave Requests

Figure 8.14. Leave Request Settings

Require approval of leave requests prior to loading them in user timesheets

This option will require all pending leave requests to be explicitly approved by respective approvers or supervisors before being displayed in the user's timesheet. Once the request has been approved, it will be displayed in the user's timesheet and can be saved.

Allow users to request time off in the past

This option allows users to create leave requests for dates that have already past in the event they forget to request leave before taking time off.

Show only designated time approvers in user leave request notification lists

If users are required to send notifications when requesting leave, this option will display in the notification list only those approvers that have been assigned to the user via a Time Approval Plan. The user will be able to select the approvers to notify from this list.

Require users to send notifications when requesting leave

This option will require users to select a manager or administrator to be notified via email when users are requesting time off from work.

Leave Request email notification subject

This is the subject of the email that will be sent from users to the selected recipients when they request time off. By default, it uses Journyx Tricky Tags that automatically pull the correct user name based on the sender and the selected recipients.

Body text for Leave Request email notifications

This is the body of the email that will be sent from users to the selected recipients when that user requests time off. By default, it uses Journyx Tricky Tags that automatically pull the correct user and manager name based on the sender and the selected recipients.

Require managers to give a reason when Leave Requests are declined

This option will require managers and administrators to provide a reason for any declined Leave Requests made by users. The reason for the rejection will be sent via email to the user.

Leave Request declined email notification subject

This is the subject of the email that will be sent to users when his/her Leave Requests have been declined. By default, it uses Journyx Tricky Tags that automatically pull the manager name based on the sender and the selected recipients.

Body text for Leave Request declined email notifications

This is the body of the email that will be sent to users when his/her Leave Requests have been declined. By default, it uses Journyx Tricky Tags that automatically pull the correct user and manager name based on the sender and the selected recipients.

Leave Request approved email notification subject

This is the subject of the email that will be sent to users when his/her Leave Requests have been approved. By default, it uses Journyx Tricky Tags that automatically pull the manager name based on the sender and the selected recipients.

Body text for Leave Request approved email notifications

This is the body of the email that will be sent to users when his/her Leave Requests have been approved. By default, it uses Journyx Tricky Tags that automatically pull the correct user and manager name based on the sender and the selected recipients.

The following is a list of Journyx Tricky Tags that are supported in Leave Request emails:

- <userlogin> - Requesting user login
- <userfullname> - Requesting user full name
- <useremail> - Requesting user email address
- <link> - Link to the request approval screen
- <managerlogin> - Manager (user who is notified) user login
- <managerfullname> - Manager (user who is notified) user full name

Third Party Software

Third Party Software Settings

Servers which are allowed to connect: (comma separated list)

☐ Only allow users connected to Project Server to synchronize

☐ Warn MS Project Admins when synchronizing a Microsoft Project File for the first time

☒ Allow MSP Admins to create users and modify their attributes

is authoritative for Task (Scheduled) Work after Projectlink file registration

☐ Take Project Approvals into consideration when returning entries to MSP and QuickBooks

Figure 8.15. Third Party Software Settings

Servers which are allowed to connect

This option allows you to control which Microsoft Project Server installations are allowed to synchronize to this installation of Timesheet. If nothing is entered, then nothing will be authorized. This preference is used to help eliminate duplicate synchronizations. Since there is no way within Microsoft Project to determine that User A who logs onto the Project Server http://testprojectserver actually logs onto the same server as User B who logs onto the

Project Server <http://10.1.1.1>, this preference helps administrators ensure that all Microsoft Project Server users in their organization access the Microsoft Project server in the same fashion. As such, entering "testprojectserver" and not 10.1.1.1 would ensure that Project A, which resides on the server would not get synchronized to Timesheet twice, once for each server. You can specify multiple servers using comma delimiters. For more information about Projectlink, see the latest version of the Projectlink User Manual.

Only allow users connected to Project Server to synchronize

This option allows you to ensure that "local" files which are not published to the Microsoft Project Server cannot be synchronized. In the event that this option is checked and the synchronizing user is not logged onto a Microsoft Project Server, he/she will not be allowed to continue. In the event that this option is not checked, the preference is basically ignored, allowing anyone to connect and synchronize. For more information about Projectlink, see the latest version of the Projectlink User Manual.

Warn MS Project Admins when synchronizing an Microsoft Project File for the first time

Older versions of Projectlink, versions prior to 4.0 specifically, stored file registration information in a .ini file with the same name as the MSP file being synced. For customers transitioning from older versions of Projectlink, new versions will automatically transfer the .ini file registration information to the properties of the MSP file when you sync. If you have been using a version of Projectlink that is older than 4.x AND you are transitioning from MS Project desktop to MS Project Server, Journyx recommends you turn this setting on. In this case, Projectlink will not be able to locate the corresponding .ini file on its own. If this option is checked, the synchronizing user will be warned that the project does not exist in Journyx and asked whether this is the first synchronization. If this option is not checked, the user will be prompted to enter the 'jxid' of the file. This jxid resides in the .ini file originally associated with the initial synchronization. For more information about Projectlink, see the latest version of the Projectlink User Manual.

Allow MSP Admins to create or modify user attributes

This option determines whether or not users with the MSP Admin role can create and modify other users in the Journyx system using Projectlink sync with MS Project. If this option is enabled, MSP Admins can create users or modify any matching custom fields by making changes in MS Project and syncing them to Journyx. If this option is disabled, MSP Admins will only be able to associate users in MS Project with existing users in the Journyx system. MSP Users' abilities to modify existing users are also subject to this setting with the exception that they can never create users.

Journyx/MS Project is authoritative for Task (Scheduled) Work after Projectlink file registration

This option determines which system, Journyx or MS Project, updates the work/scheduled work for tasks in the other system. MS Project determines the task work values when a file is first registered and uploaded to the Journyx system. After the initial registration, you can choose which system will be authoritative for task work values. While Journyx is always authoritative for assignment work values, unassigned task work can be adjusted in either system and transferred to the other based on this option. Journyx is the default setting, and task work/scheduled work values should be changed in Journyx and passed back to MS Project unless you change this setting to MS Project.

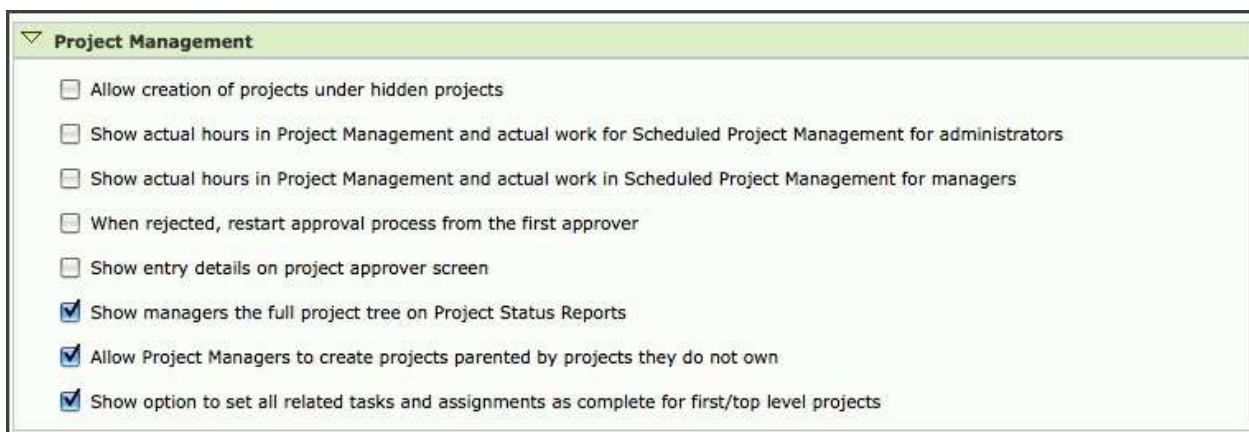
Take Project Approvals into consideration when returning entries to MSP and QuickBooks

This option ensures that records that area approved via a Project Approval Plan will be transferred to MS Project and QuickBooks in addition to records approved via sheet Approval

Plans. If this option is not enabled, only records approved via Sheet Approval Plans will be transferred.

Project Settings

Project Management



Project Management	
<input type="checkbox"/>	Allow creation of projects under hidden projects
<input type="checkbox"/>	Show actual hours in Project Management and actual work for Scheduled Project Management for administrators
<input type="checkbox"/>	Show actual hours in Project Management and actual work in Scheduled Project Management for managers
<input type="checkbox"/>	When rejected, restart approval process from the first approver
<input type="checkbox"/>	Show entry details on project approver screen
<input checked="" type="checkbox"/>	Show managers the full project tree on Project Status Reports
<input checked="" type="checkbox"/>	Allow Project Managers to create projects parented by projects they do not own
<input checked="" type="checkbox"/>	Show option to set all related tasks and assignments as complete for first/top level projects

Figure 8.16. Project Management Settings

Allow creation of projects under hidden projects

This option allows for the creation of projects under parent projects whose status has been set to hidden. If the hidden projects are not displayed in the project tree, creating new projects under hidden projects is not possible.

Show actual hours in Project Management for administrators

This option will allow Administrators to view the total hours logged to each project.

Show actual hours in Project Management for managers

This option will allow Managers to view the total hours logged to each project.

When rejected, restart approval process from the first approver

If a sheet is rejected at any level in the project approval process, this option will force the sheet to begin the approval process over again with the first approver.

Show entry details on project approver screen

When this option is not enabled, a summary of the projects submitted for approval is displayed on the Project Approver's approval screen. When this option is enabled, entry record details are displayed for each project submission on the Project Approver's screen.

Show managers the full project tree on Project Status Reports

This option will display the complete project tree in Project Status Reports, including projects that are not in the groups of the user viewing the report. If this option is not checked, the system will display only projects that are within the groups of the user viewing the report.

Show option to set all related tasks and assignments as complete for first/top level projects

This option determines whether or not users can set all tasks as complete from the top level project screen. In the event a user with access to modify a selected scheduled project clicks

on the option to set all tasks as complete from the top level project screen, ALL tasks for the project will be set to complete by changing scheduled work to equal actual work, and any remaining work will be deleted. The option to set tasks as complete is always available at the task level, but it is optional to show it at the project level.

Resource Management

Resource Management

Alert ☐ when a user's allocation is greater than 100% for an assignment
Alert/Warning message: Overtime (<number_of_hours> hours) or duration change required.

Alert ☐ when a user changes estimated work remaining for an assignment.
Alert/Warning message: <user> has estimated a change of <remaining_work_hours> hours to complete it.

Alert ☐ when a user's actual hours exceed the assignment scheduled hours by <percent> percent.
Alert/Warning message: User <user> actual work is <percent_over_schedule> percent over schedule. Actual work is <actual_work_hours> hours.

Alert ☐ <days> days before an assignment is due.
Alert/Warning message: Assignment completion due in <assignment_due_days> day(s).

Alert ☐ when an assignment is overdue.
Alert/Warning message: Assignment completion overdue <overdue_days> day(s).

Alert ☐ <days> days after no actual work has been entered for a current assignment.
Alert/Warning message: No actual work entered for the last <work_wait_days> days.

☐ Require users to enter a comment when changing the estimated work left on a project.

☐ Require users to send email to the project owner when changing the estimated work left on a project.

Assignment estimated work change notification
SUBJECT: Estimated work changed on task <assignmenttask>
Body text for user estimated work change request notification: User <requestorfullname> (<requestorid>) estimates <newworkestimate> (<newestimatedate>) hours of remaining work on <assignmenttask>. <scheduledwork>

☒ Always send email to the assignee on assignment creation.

☒ Always send email to the assignee on assignment modification.

☒ Always send email to the assignee on assignment deletion.

☒ Send email on assignment creation or modification using the email address of the person making the change.

Assignment create notification subject: New assignment on task <assignmenttask>
Body text for assignment creation user notification email: An assignment on the task <assignmenttask> has been created for you by <assignmentcreatorfullname> starting on <assignmentstartdate> ending on <assignmentenddate>.

Assignment modification notification subject: Modified assignment for task <assignmenttask>
Body text for assignment modification user notification email: Your assignment on <assignmenttask> has been modified by <assignmentcreatorfullname> New Start: <assignmentstartdate> Old Start: <oldassignmentstartdate>.

Assignment delete notification subject: Deleted assignment for task <assignmenttask>
Body text for assignment delete user notification email: Your assignment on <assignmenttask> has been deleted by <assignmentcreatorfullname> Assignment Start: <oldassignmentstartdate> Assignment End: <oldassignmentenddate>.

☒ Enable use of Resource Requests for Scheduled Project Management users.

☒ Show completed tasks on My Assignment Screen.

Default hourly pay rate for assignment work (if no user pay rate exists):

Default hourly bill rate for assignment work (if no user bill rate exists):

Overhead percentage applied to assignment work (can be overridden in user overhead percent configuration):

Default number of hours worked each week (can be overridden in user work hours per week configuration):

Number of days to look back for overdue assignments:

Number of days to look back for rolup reporting:

Figure 8.16.1. Resource Management Settings

Alerts are notices that are triggered by specific schedule and resource allocation situations associated with Scheduled Projects. The triggers for the available alerts are described below. When triggered, alerts show up with a red alert icon. Each alert can be changed to a warning (yellow icon) if it is a lower priority, or an alert can be disabled entirely if it is not critical to your process.

Alert/warn/ignore when a user's allocation is greater than 100% for an assignment

If a user is assigned for more than 8 hours per day based on an assignment's scheduled hours and duration, an over allocation alert will be triggered if this setting is enabled. You can customize the alert message. The following Journyx fields are available for use in this message: <number_of_ot_hours>

Alert/warn/ignore when a user changes estimated work remaining for an assignment

If users request more or less time to complete an assignment, a change alert will be triggered that will show the nature of the change and the user requesting it if this setting is enabled. These alerts are cleared when the Project Manager adjusts the project schedule to accommodate the change. You can customize the alert message. The following Journyx fields are available for use in this message: <remaining_work_hours> and <ufn>, which is the abbreviation for User Full Name

Alert/warn/ignore when a user's actual hours exceed the assignment scheduled hours by X percent

If a user exceeds the scheduled amount of assignment hours by entering actual hours that exceed this setting's percentage, an alert will be triggered when this setting is enabled. You can customize the alert message. The following Journyx fields are available for use in this message: <percent_over_schedule>, <assign_actual_hours>, <sched_hours> and <ufn>, which is the abbreviation for User Full Name

Alert/warn/ignore X days before an assignment is due

This alert is a reminder that is triggered the set number of days before an assignment is due when enabled. You can customize the alert message. The following Journyx fields are available for use in this message: <assignment_due_days>

Alert/warn/ignore when an assignment is overdue

This alert is triggered when an assignment has not been completed by the due/scheduled end date if this setting is enabled. You can customize the alert message. The following Journyx fields are available for use in this message: <overdue_days>

Alert/warn/ignore X days after no actual work has been entered for a current assignment

This alert is a notice that is triggered when no time has been entered against an assignment for a set number of days when enabled. You can customize the alert message. The following Journyx fields are available for use in this message: <work_wait_days>

Require users to enter a comment when changing the estimated work left on a project

This is an optional setting for requiring users to enter comments when changing the Estimated Remaining field for any assignment on the My Assignments screen. Users can enter comments without this setting enabled, but comments will be required if this setting is turned on.

Require users to send email to the project owner when changing the estimated work left on a project

This setting generates an automatic email notification when users make changes to the estimated remaining work for an assignment. The email notification is delivered to the project owner and backup owner. If no owner or backup owner is selected, no notification is generated. The two fields below this setting allow you to customize the subject and body text of this notification. The default text includes tags, shown in angle brackets, with options for showing auto-generated system information related to the change. The following tags are available for the subject: <assignmenttask> and <assignmenttaskdescription>. The following tags are available for the body: <assignmenttask>, <assignmenttaskdescription>, <requestorfullname>, <requestorlogin>, <newworkestimate>, <newestimatedelta>, <scheduledwork> and <newscheduledwork>.

Always send email to the assignee on assignment creation

This setting generates an automatic email notification to any user who is assigned to a

new task. If the user does not have a valid email address in the Journyx system, no notification will be generated. Fields below the assignee notification settings allow you to customize the subject and body text of this notification. The default text includes tags, shown in angle brackets, with options for showing auto-generated system information related to the change. The following tags are available for the subject: <assignmenttask> and <assignmenttaskdescription>. The following tags are available for the body: <assignmenttask>, <assignmenttaskdescription>, <assignmentcreatorfullname>, <assignmentstartdate>, <assignmentenddate> and <assignmentworkhours>.

Always send email to the assignee on assignment modification

This setting generates an automatic email notification to any assignee when the details of the assignment are changed. If the user does not have a valid email address in the Journyx system, no notification will be generated. Fields below the assignee notification settings allow you to customize the subject and body text of this notification. The default text includes tags, shown in angle brackets, with options for showing auto-generated system information related to the change. The following tags are available for the subject: <assignmenttask> and <assignmenttaskdescription>. The following tags are available for the body: <assignmenttask>, <assignmenttaskdescription>, <assignmentcreatorfullname>, <assignmentstartdate>, <assignmentenddate>, <assignmentworkhours>, <oldassignmentstartdate>, <oldassignmentenddate> and <oldassignmentworkhours>.

Always send email to the assignee on assignment deletion

This setting generates an automatic email notification to any assignee when the assignments is deleted. If the user does not have a valid email address in the Journyx system, no notification will be generated. Fields below the assignee notification settings allow you to customize the subject and body text of this notification. The default text includes tags, shown in angle brackets, with options for showing auto-generated system information related to the change. The following tags are available for the subject: <assignmenttask> and <assignmenttaskdescription>. The following tags are available for the body: <assignmenttask>, <assignmenttaskdescription>, <assignmentcreatorfullname>, <oldassignmentstartdate>, <oldassignmentenddate> and <oldassignmentworkhours>.

Send email on assignment creation or modification using the email address of the person making the change

This setting applies to the 3 assignee email notifications above. It fills in the from address of the automatic email notification with the user who creates or makes the change to the assignment if that person has an email address configured in the system. If this setting is not enabled or if the user does not have an email address configured, the email will be sent using the address in Server and Email System Settings for the "'From' address for email sent by the system". In the event that the from address system setting is not configured, a default system from address will be used. The default system from address is hard coded to be 'Email_Not_Configured_NoReply@jxnoreplyaddr.com'.

Enable use of Resource Requisitions for Scheduled Project Management users

This is an optional setting that gives any account with Scheduled Project Management access automatic access to request resources or review resource requisitions. When this setting is enabled, Resource Requisition menu items will appear under the Management menu and a Resource Requisition button will appear on task modification screens.

Show completed tasks on My Assignments Screen

This setting determines if assignments marked as finished follow the look back period for

assignments (see below) or ignore the look back period when they are displayed on My Assignments. If this setting is on, completed assignments will be shown for the duration of the look back period below (e.g., in case the user has to come back to the assignment to do some more work). If this setting is off, assignments marked as finished will no longer be displayed on My Assignments in the next period.

Default hourly pay rate for assignment work (if no user pay rate exists)

This is the default hourly rate used to calculate labor cost figures in Dashboard reports if no specific rates are assigned to the users in the User Profile.

Default hourly bill rate for assignment work (if no user bill rate exists)

This is the default hourly rate used to calculate revenue/billable amounts in Dashboard reports if no specific rates are assigned to the users in the User Profile.

Overhead percentage applied to assignment work

This is an optional setting for the overhead percentage used to calculate resource availability for assignment work and included in calculations for Scheduled Projects in Dashboard reports. There is an overhead percentage setting for individual users as well. If the user value is blank, this setting will be applied to the user. If the user setting is different, the user setting will override this one.

Default number of hours worked each week

This setting determines resource availability and work scheduling for assignments. There is a weekly hours setting for individual users as well. If the user value is blank, this setting will be applied to the user. If the user setting is different, the user setting will override this one.

Number of days to look back for overdue assignments

This setting determines how long overdue assignments/assignments from previous periods will continue to show up in a user's current My Assignments list. This setting will also determine how long completed assignments are shown unless the setting for showing completed assignments above is off.

Number of days to look back for rollup reporting

This setting controls how far in the past to look for scheduled work and actual work data to roll up into project totals in Dashboard reports. If you do a one-time import of historical project data into the Journyx system, you will need to make this setting large enough to capture the date range of the historical data and run alert and rollup report checks as explained below. After you have run the data rollup, you can reset the number of days to your desired period for capturing the typical lag for getting user time/time corrections entered against projects.

Run alert and rollup report checks

This button manually runs rollup data that is ordinarily updated on a regular schedule. Some data for Scheduled Projects and Dashboard reports is only updated when this process is run.

Security

Data Management Settings

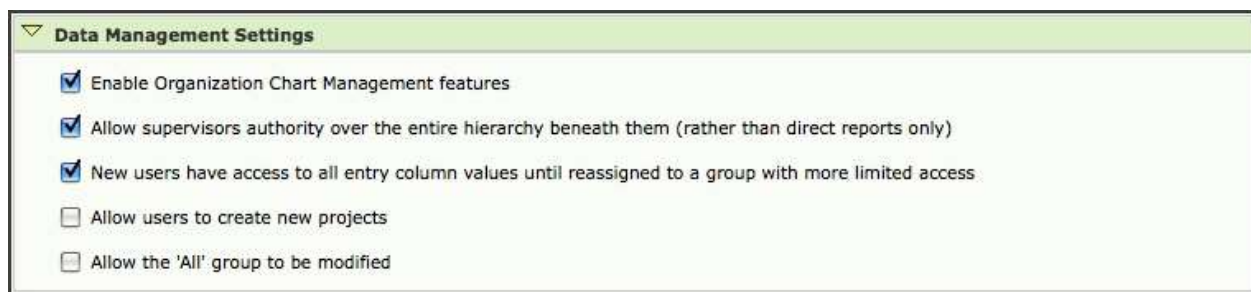


Figure 8.17. Data Management Settings

Enable Organization Chart Management features

This option allows you to use the Organization Chart Manager (OCM). For sites with existing approval plans, Journyx recommends you use OCM with caution because it will take over your time approval plans and delete any created manually. Please refer to the Org Chart Manager section of this manual for more information. If you choose not to use OCM, you can use this setting to disable it and ensure that no one can delete your manually created time approval plans.

Allow supervisors authority over the entire hierarchy beneath them (rather than direct reports only)

This option is specific to the hierarchy accessibility created by the Organization Chart Manager. If you are using OCM, this setting will determine the level of supervisor access to the users below them. If this setting is enabled, supervisors will be able to report on direct subordinates, as well as subordinates lower in the hierarchy. If this setting is disabled, supervisors will only be able to report on their direct subordinates.

New users have access to all entry field values until reassigned to a group with more limited access

This option will allow new users to have default access to all projects and entry field values in the system by automatically assigning them to the 'All' group. Check this option only if there will be no varying levels of access between users of the system. If you will require users to have different levels of access to field values such as projects, do not check this option. If this option is not checked, you must specify a group assignment when creating a new user. Otherwise, the new user will be created with the status 'hidden' and will not be able to login to the system until the user has been returned to active status by assigning him/her to a group or groups.

Allow users to create new projects

This option will allow all users, regardless of role assignment, to create new projects from within the project management section of the software.

Allow the 'All' group to be modified

This option allows complete modification of the 'All' group which by default contains all of your organization's projects, users, roles, clients, tasks, pay types, bill types, expense codes, sources, currencies, reasons, vehicles, measurements, time entry screens, expense entry screens, mileage entry screens, start/stop modules, and punch entry screens. With the exception of the removal of users, it is highly inadvisable to modify the 'All' group. Either option will still allow for the addition or removal of users from the 'All' group; therefore, this setting should remain disabled for most configurations.

Password Settings

Password Settings

Expire passwords after this many days (0 for never):

Minimum number of password characters:

Number of previously used passwords to block (100 max):

☐ Require mix of letters and numbers in passwords

☐ Require mix of uppercase and lowercase letters in passwords

☒ Show a password reset button on login screen

Password reset request window (in hours):

Password reset request notification subject:

Body text for password change request email response:

A request has been made to reset the password for <userfullname>, (<userlogin>). If you made this request, complete the reset by clicking the following link: <link> If you do not want to change your password, you may ignore this email.

Send email to this address on password reset failure (leave blank for no mail):

Password reset failure subject:

Body text for email sent to administrator on password reset failure:

A user in your Timesheet system has attempted a password reset and has failed. This person may need assistance. Username provided: <userlogin> Reason for failure: <msg>

Figure 8.18. Password Settings

Expire passwords after this many days (0 for never)

This option allows you to specify how often users of the system will have to change their passwords for security purposes. Making this option '0' means that passwords will never expire.

Minimum number of password characters

This is the minimum number of characters that will be required for user passwords.

Number of previously used passwords to block

This option will prevent users from creating passwords that are the same as previous expired passwords. You can specify the number of previous passwords that users will not be able to recreate.

Require mix of letters and numbers in passwords

This option will force users to only create passwords containing both alpha and numeric characters.

Require mix of uppercase and lowercase letters in passwords

This option will force users to create passwords that contain at least one lowercase letter and at least one uppercase letter. It should work across all languages that include this concept including most European languages. Some languages (e.g. Arabic, Japanese) do not distinguish between uppercase and lowercase characters. If you enable this setting users will not be able to create a password in those languages unless they also include some letters from a European alphabet. Changes to this setting will not take effect until the next time a user changes his or her password.

Show a password reset link on login screen

This option will display a password reset link on all users' login screens that users can click in the event that they have forgotten their passwords. The user will then be required to specify his/her username. If an email address exists for that user, the system will

send an email to the user containing a link that will allow the user to create a new password for his/her account.

Password reset request window (in hours)

This option determines the length of validity of the password reset link in emails sent to users who forget their passwords.

Password reset email subject

This option allows you to specify the text that will appear in the subject line of each email the system sends to a user in the event that he/she has forgotten his/her login password.

The following is a list of Journyx Tricky Tags that are supported in password reset subject lines:

- <userfullname> - User name for which the password is being reset
- <userlogin> - User login for which the password is being reset

Password reset email body

This option allows you to specify the text that will appear in the body of the email the system sends to a user in the event that he/she has forgotten his/her login password.

The following is a list of Journyx Tricky Tags that are supported in password reset emails:

- <userfullname> - User name for which the password is being reset
- <userlogin> - User login for which the password is being reset
- <link> - Link that will generate a link back to Timesheet where users can reset passwords

Send email to this address on password reset failure

This option allows you to designate a single email address for notification when users' attempts to reset passwords fail for any reason. For security reasons, the users themselves cannot be given the information on the reason for failure (the user has no email address, the user supplied an invalid username, etc.). If you leave this field blank, no email with failure information will be sent.

Password reset failure email subject

This option allows you to specify the text that will appear in the subject line of each email the system sends when an attempt to reset a password fails.

The following is a list of Journyx Tricky Tags that are supported in password reset subject lines:

- <userlogin> - User login for which the password is being reset

Password reset failure email body

This option allows you to specify the text that will appear in the body of the email the system sends when an attempt to reset a password fails.

The following is a list of Journyx Tricky Tags that are supported in password reset failure emails:

<userlogin> - User login for which the password is being reset
 <msg> - Failure reason detected

Login Behavior



Login Behavior

Idle time before a user is required to login again (in minutes):

Idle time before the login screen expires (in minutes):

☐ Lock users out after too many failed login attempts

Number of failed login attempts before user is locked out:

☒ Allow users to specify their own Landing Page

Figure 8.19. Login Behavior Settings

Allow user-entered text to be displayed as HTML

If this option is checked, all users will be allowed to enter text that will be displayed as HTML. Text entered with HTML tags will be rendered in browsers with the proper formatting. If this option is not checked, all users will still be able to enter HTML tags as text, but those tags will not be displayed as HTML and will not be browser compatible.

Idle time before a user is required to login again (in minutes)

This option allows you to specify how long users can remain logged in and idle before they are forced out of the system and required to log in again. This option is set in minutes.

Idle time before the login screen expires (in minutes)

This option allows you to specify how long the login screen remains idle before users are forced to reload the page and try logging in again. This option is set in minutes.

Lock users out after too many failed login attempts

This option allows you to set a maximum number of failed login attempts made by a user before they are locked out of the system. Users who are locked out will require an administrator to reset their passwords in order to login again.

If you would like users redirected to a custom logout page, enter the URL here

If you want users to be redirected to a custom page when they click the logout link, specify the URL.

Security



Security

☐ Allow user entered text to be displayed as HTML

If you would like users redirected to a custom logout page, enter that URL here:

Maximum size in megabytes (MB) of file attachments, receipt images and other uploads. Use 0 for unlimited.

Figure 8.18b. Security

Allow user entered text to be displayed as HTML

This option allows users to enter HTML in comment and notes fields that will then be converted by the browser.

If you would like users redirected to a custom logout page, enter that URL here

This option allows you to redirect users to a custom page after logging out.

Maximum size in megabytes (MB) of file attachments, receipt images and other uploads. Use 0 for unlimited.

This option allows you to limit the file size of files uploaded to specific records on entry screens.

Login Restriction

System Settings: Login Restriction

Allow only the following users to log in:

Login Restriction is currently: **Off**

[search](#)

- 1, u
- 2, u
- meredith

Enable Login Restriction

Figure 8.20. Login Restriction

This option allows you to lockout certain users from having access to the web interface via browser. You can lockout the entire system by clicking the 'Enable Login Restriction' button. Before doing so, make sure you understand that this will also lock you out of the system as well. From the listbox, you can select the users that you still want to grant access to the system via the web interface. Be sure to select these users before enabling the web interface lockout.

Logging

Logging Options

Enable:

- ☐ Extended Tracebacks
- ☒ Audit log (1 KB)
 - [View Audit Log](#)
- ☐ Diagnostic log (1 MB)
 - [Delete Diagnostic Log File](#)

Figure 8.21. Logging Options

Enable extended tracebacks

This option will display extended information about errors you may encounter using Timesheet. Checking this option is highly recommended as it will greatly aid Journyx in assisting you if you have problems with Timesheet.

Enable audit log

Enabling this log will track most actions performed within the Timesheet system. It is recommended you leave this log off except when it is specifically needed because it grows exponentially in size with every day you leave it turned on.

Enable diagnostic log

This log tracks the database queries in various parts of Timesheet. This is also helpful when you have a problem in your system and you want to diagnose what is wrong. Like the audit log, it is recommended that you leave this off except for when it is specifically needed.

License Key

License Key

Current License:

CF3aZfCg5Ahd5eH/ZZeaC1VPmZ6RmhiQVf8ZVgwmFWIIJQ2g1WVgeF3WZ3dLSGskZUeMWVCQU1V0YSYVdWY2ZBeDVGRW1JRDZrHV8VVRVZmRAZaZUPRQWVXRJg9
Validates 9999 users (9999 Assignment Unrestricted DC, Unrestricted MSP) on server Unrestricted, and expires Tuesday, January 3, 2012. RM Enabled: Expires Tuesday, January 3, 2012 Work Request Enabled

☒ Text entry

Enter new license key:

☐ License key file upload

Browse for license key file location:

Browse...

Company name:

Administrator name:

Administrator phone:

E-mail:

Figure 8.22. License Key

Current License

The bold line containing alpha-numeric characters is the license key that enables your version of Timesheet to work properly. It also lists your current number of licensed users, the server the application is hosted on, and the license expiration date. If you have purchased modules, it will state whether you have access to Projectlink, Accountlink, and Disconnected User modules.

New License Key

If you would like to replace the license key with a new license key, you have two options. You may enter the key manually by cutting and pasting the key. Alternatively, you may import the license key by browsing and selecting a file that contains the license key. This option typically prevents errors when changing license keys. You must click the Save button before the license key is replaced.

Administrative Information

This section allows you to input your company name, administrator name, administrator phone, and your email address. This information is required the first time you enter a license key.

Custom Bug Reporting

A screenshot of a web form titled "Custom Bug Reports". It contains three input fields: "Text to be displayed on error screen:", "Text for bug report button:", and "URL for bug report button link:". Each field is represented by a text label followed by a rectangular input box.

Custom Bug Reports	
Text to be displayed on error screen:	<input type="text"/>
Text for bug report button:	<input type="text"/>
URL for bug report button link:	<input type="text"/>

Figure 8.23. Custom Bug Report Settings

Text to be displayed on error screen

This option allows you to override the default error messages with a custom error message. This is helpful when you want all error reports to go through your local administrator, rather than having users report them directly to Journyx Support.

Text for Bug Report button

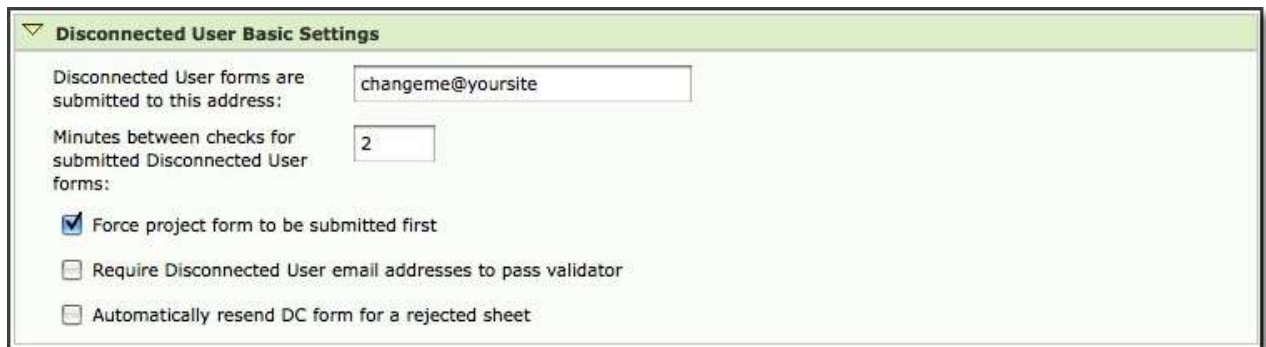
This option allows you specify the name of the button that users will click to submit a bug to Journyx or some other designated source for further evaluation.

URL for bug report link

This option allows you to specify the URL for the button that will be displayed along with the custom error messages. When clicked, the button will link the user to the specified URL from the error message page. Typically, a CGI script must exist within the referenced URL to achieve maximum error processing functionality. Please contact the Journyx Professional Services team to receive assistance with this feature.

Disconnected Users

Disconnected User Basic Settings

A screenshot of a web form titled "Disconnected User Basic Settings". It contains several settings: a text field for "Disconnected User forms are submitted to this address:" with the value "changeme@yoursite"; a text field for "Minutes between checks for submitted Disconnected User forms:" with the value "2"; and three checkboxes: "Force project form to be submitted first" (checked), "Require Disconnected User email addresses to pass validator" (unchecked), and "Automatically resend DC form for a rejected sheet" (unchecked).

Disconnected User Basic Settings	
Disconnected User forms are submitted to this address:	<input type="text" value="changeme@yoursite"/>
Minutes between checks for submitted Disconnected User forms:	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Force project form to be submitted first	
<input type="checkbox"/> Require Disconnected User email addresses to pass validator	
<input type="checkbox"/> Automatically resend DC form for a rejected sheet	

Figure 8.24. Disconnected User Basic Settings

Disconnected User forms are submitted to this address

This option allows you to specify the address to which all Disconnected User forms will be sent. You may modify this text as required by your organization; however, please note that the 'mailto:' tag must remain part of this field. The default value 'mailto:changeme@yourhost' must be changed before users will be able to utilize the Disconnected User features.

Minutes between checks for submitted Disconnected User forms

This option allows you to specify the number of minutes that the system will wait between checks for newly submitted Disconnected User forms. The default value for this option is 2 minutes.

Force project form to be submitted first

This option allows you to specify whether or not a Disconnected User must submit any outstanding Project Creation forms before submitting any outstanding Time, Expense or Mileage Entry forms. Journyx recommends that this option always be checked to ensure that no errors occur due to Time, Expense or Mileage records being submitted and logged against a newly created Disconnected Project that has not been logged to the Timesheet database.

Require Disconnected User email addresses to pass validator

This option allows you to configure the system to check each incoming Disconnected User's 'From' address to confirm that it is a valid email address. This option serves as an additional level of security for the Disconnected User process.

Disconnected User Mail Text

Figure 8.25. Disconnected User Mail Text

Subject line prefix for Disconnected User form emails

This option allows you to specify the text that will appear in the Subject line of each email the system sends containing a Disconnected User form. The default text for this field is 'JTime DC'.

Body text for Disconnected User form emails

This option allows you to specify the text that will appear in the body of each email the system sends containing a Disconnected User form. The default text for this field is 'Please open these HTML attachments in your web browser by double-clicking on them.' This is a multi-part message in MIME format with base64 encodings. Your mail reader should be able to figure this out automatically. If you change the encoding method (see below), you should change the information on the encoding method contained within this text.

Disconnected User Mail Sending



Figure 8.26. Disconnected User Mail Sending

Disconnected User form sender name and email

This option allows you to specify the name and email address that will be displayed in the 'From' line of each email the system sends related to the Disconnected User module. The default text for this field is 'Journyx Timesheets <discon@journyx.com>'.

SMTP server mail (outgoing mail)

This option allows you to specify the name of the SMTP (outgoing) mail server that the system will use when sending emails related to the Disconnected User module. The default value for this field is 'smtp'.

SMTP port (usually 25)

This option allows you to specify the port used by the SMTP (outgoing) mail server that the system will use when sending emails related to the Disconnected User module. The default value for this field is '25'.

Form encoding method

This option allows you to specify which encoding method the system will use when sending emails related to the Disconnected User module. While future versions of Timesheet will support alternate encoding methods, Timesheet supports only one encoding method, base64. More information on the base64 encoding method can be found at the following URL: <ftp://ftp.isi.edu/in-notes/rfc1421.txt>.

Outgoing mail user agent

This option allows you to specify which mail client is shown as the sender of outbound Disconnected User form emails. The default value is 'Journyx Disconnected Client Mailer'.

Disconnected User Mail Receiving



Figure 8.27. Disconnected User Mail Receiving

Incoming mail server type (IMAP or POP)

This option allows you to specify which type of incoming mail server the system will use when receiving incoming Disconnected User emails. The two options are IMAP or POP.

Incoming mail account name

This option allows you to specify the name for the incoming mail account that the system will use when receiving incoming Disconnected User emails. The default text for this field is 'discon'.

Incoming mail account name password

This option allows you to specify the password for the incoming mail account that the system will use when receiving incoming Disconnected User emails. The default password is 'discon1'.

Incoming mail server name

This option allows you to specify the name of the incoming (POP or IMAP) mail server that the system will use when receiving incoming Disconnected User emails. The default value for this field is 'mail'.

Incoming mail port

This option allows you to specify the port used by the incoming (POP or IMAP) mail server that the system will use when receiving incoming Disconnected User emails. The standard port for a POP server is 110. The standard port for an IMAP server is 143. The default value for this field is '143'.

Incoming mail folder

This option, required for IMAP servers only, allows you to specify the mail folder where the system will look for incoming emails related to the Disconnected User module. The default value for this field is 'INBOX'.

Disconnected User Visible Text

Disconnected User Visible Text	
Request Submit button text:	Request Forms
Retire requests button text:	Retire these Disconnected
Instructions that appear at the top of each Disconnected form:	<H2>Journyx Time Disconnected Client</H2>Please see your Journyx documentation for instructions.<P>
Text to show in front of Approval checkbox:	<P>Check to submit this form for approval:
Time format specifier:	%m/%d/%Y %H:%M:%S

Figure 8.28. Disconnected User Visible Text

Request Forms button text

This option allows you to specify the text that will appear within the button that users click to request Disconnected User forms. The default value for this field is 'Request Forms'.

Retire Requests button text

This option allows you to specify the text that will appear within the button that users click to retire Disconnected User forms. The default value for this field is 'Retire these Disconnected User requests'.

Instructions that appear at the top of each Disconnected User form

This option allows you to specify the text that will appear at the top of each Disconnected User form. The default value for this field is 'Journyx Time Disconnected Client. Please see your Journyx documentation for instructions.'

Text to show in front of approval checkbox

This option allows you to specify the text that will appear next to the approval submission checkbox on each Disconnected User form. The default value for this field is 'Check to submit this form for approval'.

Time format specifier

This option allows you to specify the format that the system will use for storing the times associated with each Disconnected User form. You may modify this format as required by your organization. The default value for this field is '%m/%d/%Y %H:%M:%S'. These characters translate as follows:

%m = month
 %d = day
 %Y = year
 %H = hours
 %M = minutes

%S = seconds

These characters are simply used to delimit the time and date strings. Therefore, to change the general time format specifier to HH:MM year/month/day, you would change this option to '%H:%M %Y/%m/%d'.

Disconnected User Advanced Settings

▼ **Disconnected User Advanced Settings**

Expire requests this many days after the final period:	<input type="text" value="28"/>
Process at most this many mail messages per check:	<input type="text" value="15"/>
Max number of time periods in advance that user can select:	<input type="text" value="8"/>
Number of entry rows on Disconnected User Timesheet:	<input type="text" value="8"/>
Number of entry rows on Disconnected User Expense sheet:	<input type="text" value="8"/>
Number of entry rows on Disconnected User Project sheet:	<input type="text" value="8"/>
Number of entry rows on Disconnected User Mileage sheet:	<input type="text" value="8"/>
Forward response to junk email here: (Use None to ignore junk email)	<input type="text" value="None"/>

Figure 8.29. Disconnected User Advanced Settings

Expire requests this many days after the final period

This option allows you to specify the number of days that forms remain valid. You may modify this time period as required by your organization. The default number of days for this option is '28'.

Process at most this many mail messages per check

This option allows you to specify a maximum number of Disconnected User forms that the system will process at any given mail check. The default number of days for this option is '10'.

Maximum number of time periods that user can select in advance

This option allows you to control how far in advance users can request Disconnected User forms. This option is based on the time period assigned to each user. Therefore, if your organization uses several radically different time periods, you may need to consider this option carefully to ensure that users who no longer have access to certain time periods also do not have access to forms that are multiple months out. The default number of periods for this option is '8'.

Number of entry rows on Disconnected User timesheet

This option allows you to specify the number of blank rows that will be available for time entry on each Disconnected User Time Entry form. The default number of lines for this option is '8'.

Number of entry rows on Disconnected User expense sheet

This option allows you to specify the number of blank rows that will be available for expense entry on each Disconnected User Expense Entry form. The default number of lines for this option is '8'.

Number of entry rows on Disconnected User mileage sheet

This option allows you to specify the number of blank rows that will be available for mileage entry on each Disconnected User Mileage Entry form. The default number of lines for this option is '8'.

Number of entry rows on Disconnected User project sheet

This option allows you to specify the number of blank rows that will be available for reject creation on each Disconnected User Project form. The default number of lines for this option is '8'.

Forward response to junk email here

This option allows you to specify an email address to which all junk email responses will be sent. By specifying 'None', junk email will be ignored.

Resource Requisition

Figure 8.24. Resource Requisition Settings

Always send emails on resource requisition fulfillment or decline

This option allows you to turn on or off all email notifications related to resource requisitions. These emails include notices to resource managers for new requisitions and notices to project managers when requisitions have been fulfilled or declined.

Resource Requisition notification subject

This is the subject of the email that will be sent from requestors to the selected requestee. By default, it uses Journyx Tricky Tags that automatically pull the correct information based on the requestor and task selections.

Body text for Resource Requisition email notifications

This is the body of the email that will be sent from project managers to the selected requestees. By default, it uses Journyx Tricky Tags that automatically pull the correct information based on the sender and the selected recipients.

Resource Requisition declined notification subject

This is the subject of the email that will be sent from requestees to the requestor. By default, it uses Journyx Tricky Tags that automatically pull the correct information based on the requestee and task selections.

Body text for resource requisition declined email notifications

This is the body of the email that will be sent from requestees to project managers when a requisition is declined. By default, it uses Journyx Tricky Tags that automatically pull the correct information based on the sender and the selected recipients.

Resource Requisition approved notification subject

This is the subject of the email that will be sent from requestees to the requestor. By default, it uses Journyx Tricky Tags that automatically pull the correct information based on the requestee and task selections.

Body text for resource requisition approved email notifications

Body text for resource requisition approved email notifications

Imports

Import Tool Settings

Import Settings is located under Configuration→Imports→Import Tool Settings

Within the Import Tool Settings section, you can specify the default file locations of the import files for each type of field import (see figure 9.1). You can specify default import file locations for the following fields: groups, users, projects, tasks, pay types, bill types, expense codes, sources, currencies, vehicles, reasons, measurement units, group membership, dependencies, accruals, memorized entries, time/expense/mileage records, custom fields, approval plans, holidays and assignments. Please keep in mind that some of these fields may have been renamed by your system administrator. When finished, click the Save button.

Import Tools Settings

▼ Import - Group

Default file location for imports from the server:

/u/meredith/s/px80/dist/pkg/Linux/xx/tmp/GroupImport.txt

▼ Import - User

☐ Automatically add new values to custom field selection lists?

Default file location for imports from the server:

/u/meredith/s/px80/dist/pkg/Linux/xx/tmp/UserImport.txt

▼ Import - Project

☐ Automatically add new values to custom field selection lists?

Default file location for imports from the server:

/u/meredith/s/px80/dist/pkg/Linux/xx/tmp/ProjectImport.txt

▼ Import - Activity

Figure 9.1. Import Tool Settings

Import Tool Access

Import Tool Access is located under Configuration→Imports→Import Tool Access. Within the Import Tool Access section, you can specify which roles will have the ability to import files into the system for each type of field import (see figure 9.2). You can specify import access for the following fields: groups, users, projects, tasks, pay types, bill types, expense codes, sources, currencies, vehicles, reasons, measurement units, group membership, dependencies, accruals, memorized entries, time/expense/mileage records, custom fields, approval plans, holidays and assignments. You may also select multiple roles by using the ctrl-click or shift-click functionality. When finished, click the Save button.

Import Tools Access Settings

Import - Group

Administrator
Dashboard User
DC Access
Expense User
Manager

Import - User

Administrator
Dashboard User
DC Access
Expense User
Manager

Import - Project

Administrator
Dashboard User
DC Access
Expense User
Manager

Import - Activity

Administrator
Dashboard User
DC Access

Figure 9.2. Import Tool Access

Import Tools

Import Tools are located under Configuration→Imports→<Import Name> (see figure 9.3). The system allows you to import values for the following fields: groups, users, projects, tasks, pay types, bill types, expense codes, sources, currencies, vehicles, reasons, measurement units, group membership, dependencies, accruals, memorized entries, time/expense/mileage records, custom fields, approval plans, holidays and assignments. Please keep in mind that some of these fields may have been renamed by your system administrator.

The screenshot shows the 'Configuration → Imports → Group Import' screen. It features three radio buttons for different import methods:

- Import a file that is located on your computer:** Includes a 'File Location' text box and a 'Browse...' button.
- Import a file that is located on the server:** Includes a 'File Location' text box containing the path `/u/meredith/s/px80/dist/pkg/Linux/xx/tmp/GroupImport.txt`.
- Create Schedule:** Includes an 'Import Name' text box with 'Scheduled Import', a 'Schedule export to run' dropdown set to 'One Time', a date field 'on 07/20/2010', a time field 'at Midnight', and an 'Email Address for result summary (optional):' text box. It also has a 'File Location' text box with the same path as the server import method.

A green 'Preview' button is located at the bottom left of the form.

Figure 9.3. Import Tools

Once successfully imported, users will be able to select the imported entry field values from the respective dropdowns in their timesheets, expense sheets, and mileage sheets depending on group membership and access. Administrators will also be able to manipulate the imported values in their respective areas. To import values, click the field name for which you would like to import on the main Import Tools screen. The screen will refresh with the options available for that particular import.

You can import a file that is stored on your personal computer. If you choose this method, you will be required to browse and select the file or specify the file location in the textbox. Alternatively, you can import a file from the default server file location. When you want to upload a file that is on the server, the application itself will be acquiring that file. This is an important distinction for network security. For the server import (and the scheduled import as well) to work properly, the application must have the correct permissions to read the import file from the server. Therefore, paths to the import file that do not contain a drive letter will not work because the application will not have permission to read from that location. If your installation is on a Windows server, the Anonymous IIS account will attempt to read the file for import. The Anonymous IIS account usually does not have read access to most directories, neither on nor off the server. In this case, you will undoubtedly need to get assistance from your network administrator to set this up. He/she will probably suggest changing whatever program is writing the files to have them written into a folder that the Anonymous IIS user already has permission to read. Journyx further recommends using the

\\Journyx\jwt\ps directory for import purposes since this location is backed up by the application. If your installation is on a Unix server, then it will be the account that installed the application which will attempt to read the file for import. Your Unix server administrator should be able to grant the proper read permissions without a problem. After you have specified the file location, you can opt to preview the import by clicking the Preview button. When finished, click the Import button.

You may also schedule an import by specifying the file location, import name, email address, and when to schedule the import. You should not enable scheduling until you have manually imported files several times in order to verify that the system which is producing the files is doing so correctly. Keep in mind that there is no preview feature for scheduled imports. Therefore you are unable to predict corrupt data being imported. The File Location field is looking for a server-file, so you must supply a direct path to the file such as 'c:\importfiles\filename.txt'. You cannot use relative path names that reference computer names like '\\bobscomputer\importfiles\filename.txt'. For the date and time, you have the following scheduling options: one time, custom, daily, weekly, bi-weekly, monthly by day, and monthly by date. The date and time options will vary depending on the type of scheduling option chosen. For 'one time', you must specify a date and time that you wish the import to take place. For 'custom', you must specify the number of days between imports and the time at which the imports are to take place. For 'daily', you must select which days of the week and the time at which the imports are to take place. For 'weekly', you must select the day of the week and the time at which the imports are to take place every week. For 'bi-weekly', you must select the day of the week, time, and the effective date for which the imports are to take place every other week. For 'monthly by day', you must select the day of the month and the time at which the imports are to take place every month. For 'monthly by date', you must select the date of each month and the time at which the imports are to take place each month. When finished, click the Create Schedule button.

To delete an existing scheduled import, click the field name. The screen will refresh with the ability to delete any scheduled imports that you have for that specific field. Select the scheduled import to delete and click the Delete Schedule button.

Notes on Illegal Characters

There are many characters that should not be included in an import file. These characters can cause problems in displaying HTML and a few can even cause database-level errors that can be difficult to recover from. All extended-ASCII characters, like à, ü, and ñ are also forbidden.

In HTML it is possible to generate extended ASCII characters by using codes. For example, if you view the source-code of this page you will see that many characters in the following chart were produced using codes like '&# 38;' in order to create an '&'. However, '&' and '#' are not recommended characters. The fact is that they will often import, but sometimes they will display as the character you wish to display and sometimes they will display as the code itself (&# 38). This is simply a limitation of the CGI script-based nature of the application.

All of the following characters should be avoided, unless specifically stated in the notes of a particular field:

:	;	&	%	'	#	@	~	{tab}	÷	\
<	>	/	¢	£	¥	™	©	®	ı	¿
µ	ı	§	¶	¬	±	¾	½	¼		

If you must have a 'character' in the file or field, then the following are the characters that Journyx recommends:

- _ * !

File Formats, Backing Up Database, and Sample Text Files

Journyx recommends that you build your import files in Excel and save it as a tab-separated-text file. This will ensure that double-quotes are added around each field that contains a comma. Journyx has enhanced the import tool functionality to automatically strip double-quote characters from every field upon import, if and only if the double-quotes are the first and last characters in a field. Therefore, in the unlikely event that you want a field to contain an initial and ending double-quote, then you will simply have to double your double-quotes. So, for example, ""John Smith"" will result in "John Smith" being imported. Generally both double-quotes and commas should be avoided except in fields that specify them like a user's Full Name or the Groups field.

Similarly, for fields that support multiple comma-delimited values (Groups and Authority), if your Group or Authority name has a comma in it then this will cause problems with the import. An example of comma-delimited values that would cause an import problem would be 'G1, G2, G,3, G4' where the name of the third group actually contains a comma. In such a situation, double the comma in the name like this: "G1, G2, G,,3, G4". The import tool will recognize the doubled comma and treat it as a single comma that is part of the name and not a delimiter.

The following list of files is designed to help you with the different types of imports that are available. For the various types of imports, you can view or save sample text files and spreadsheets that are preformatted and ready for import. There may also be a file that

contains the proper names of headers, field size, and whether or not the field is required for import. The # column is displayed in this chart for ease of reading; your import file will not have these numbers. The Header column displays the name of each field and should also be the header in the import file. The columns in your import file may need to be changed from the values shown in the sample files if you have renamed any of the headers. The Req column indicates whether or not the field is required for import ("Y" = required). If a field is required, then every record (row of the file) must have a valid value in that field. The Size Column contains the maximum number of characters that are supported for each field. You should start by testing these in a non-production environment. The sample files that are attached can all be imported without any modifications. You can edit and re-import them to verify that you are able to edit and build importable files.

In the event that you wish to rename a system object such as a project or a task, Journyx Timesheet has a feature that allows you to efficiently rename these system objects using import files rather than changing each system object manually. This is especially helpful when you want to avoid duplication or need to make numerous name changes. In the import file, create a new column labeled 'NewName' immediately after the column containing the system object whose name(s) need changing. The old name should be in the PrettyName or ProjectName column, depending on which import tool you are using. The new name should be in the NewName column and in the row cell to the right of the old name.

Finally, you should always 'backupdb' your Timesheet database before you begin importing files, especially into your production environment. The 'backupdb' is a proprietary Timesheet backup file that contains everything necessary to replicate your environment on a different server. Backupdb is the command you will run at the Timesheet Command Line prompt and it will generate a zipped file with the '.jx' extension.

If your Timesheet server is a Windows computer, then you will have to login to the server to perform the backupdb. On the server, click [Start], [Programs], [Journyx Timesheet], and then [Timesheet Command Line Prompt]. A DOS window will appear. You are now at the Timesheet command prompt, and can run the 'backupdb' command to generate the file.

If your Timesheet server is a Unix computer then you will have to login to the server and 'su' to the account that Timesheet is running under. Find your Timesheet installation directory by looking for the 'config' file. From that directory, cd to pi/bin. In <installdir>/pi/bin, type '. ./setup' to source the setup file and set your environment variables. Now you are ready to run the backupdb command.

At the command prompt, the backupdb command is very simple. Just type 'backupdb' and you will get detailed usage instructions. Generally you will simply type 'backupdb -v backupfile' and a file called 'backupfile.jx' will be created in the directory that you are in. The backupdb command will tell you what it is doing and when it is finished. Your users will not be able to log in to Timesheet while backupdb is running.

Entry Screens

Entry screens management is located under Configuration→Entry Screens.

Entry screens are what users utilize when they log their time, expense, and mileage. Within the system, there are four types of entry screens: Time Entry Screens, Punch Screens, Expense Entry Screens, and Mileage Entry Screens. Additionally, there is the Stopwatch Module which is

an optional component for a Time Entry Screen. Each entry screen and module is explained more thoroughly below.

Time Entry Screens

Time Entry Screens is located under Configuration→Entry Screens→Time Entry Screens (see figure 1.1).

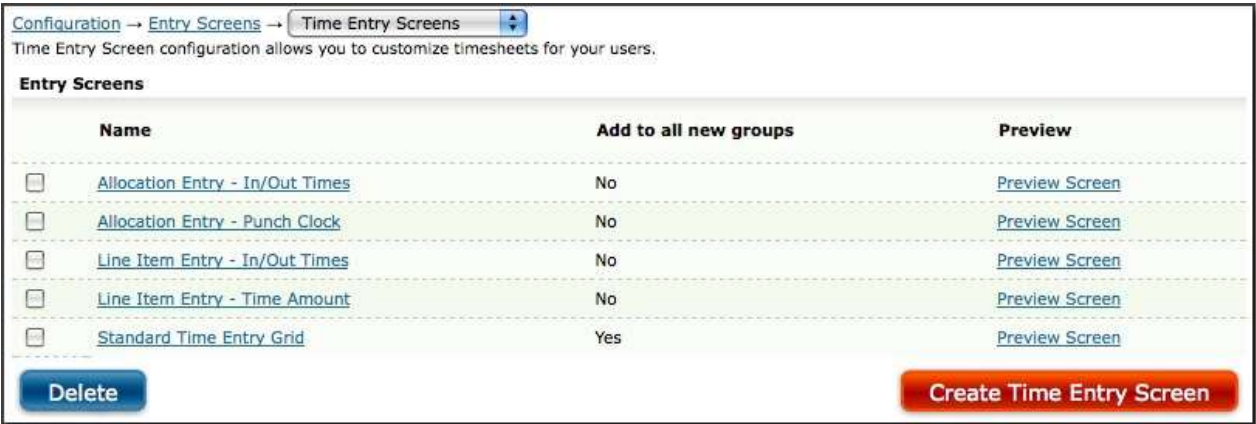


Figure 1.1 Time Entry Screen main page

Time Entry Screens are the standard entry screens that users can utilize when logging their time. These screens are highly configurable in order to suit each organization's unique time tracking process.

To create a new Time Entry Screen, click the Create Time Entry Screen button located in the lower right corner of the main Time Entry Screen page. This will direct you to the Time Entry Screen Creation page (see figure 1.2). Specify the name of the Time Entry Screen. You can select one of two layout formats for the Time Entry Screen - grid format or entry format.

Configuration → Entry Screens → Time Entry Screens → Modify
 Time Entry Screen configuration allows you to customize timesheets for your users.

Copy the settings of screen: Allocation Entry – In/Out Times Load

Name:

☒ Grid format

☐ Display in/out times at the top of the entry screen

☒ Manually enter the in/out times

☐ Press a button to populate the in/out times

☐ Entry format

Enter time as:

Enter time with:

minute increments for dropdowns

Default time period:

Time entry format:

Display days in chronological order

Number of blank entries to display:

Allow file attachment uploads?

☐ Do not allow file uploads.

☐ Allow unlimited file uploads

☒ Allow uploads; number of attachments allowed per period:

Allowed file attachment types:

☒ Add this screen to all new groups

☒ Total hours as they are entered

☐ Show Project descriptions in dropdowns

☐ Show Project tree in the Project column

☒ Show memorized entries

☒ Allow users to view past periods

☒ Allow users to view future periods

☒ Use entry field notes

☒ Use customized names for Entry Columns

Entry Columns

Column Order	Column Name	Default Value	Hide
<input type="text" value="0"/>	<input type="text" value="Group"/>	<input type="text" value="All"/>	<input checked="" type="checkbox"/>
<input type="text" value="5"/>	<input type="text" value="Project"/>	<input type="text" value="root"/>	<input type="checkbox"/>
<input type="text" value="4"/>	<input type="text" value="Activity"/>	<input type="text" value="Other"/>	<input type="checkbox"/>
<input type="text" value="3"/>	<input type="text" value="Pay Type"/>	<input type="text" value="Regular"/>	<input type="checkbox"/>
<input type="text" value="2"/>	<input type="text" value="Bill Type"/>	<input type="text" value="Standard"/>	<input type="checkbox"/>
<input type="text" value="1"/>	<input type="text" value="Comment"/>	<input type="text" value="default"/>	<input type="checkbox"/>

Maximum Comment length:

Figure 1.2 Time Entry Screen modification

Grid format presents the user with a grid of dates and spaces to enter time for the dates that are displayed. Multiple entries for a given day are possible in this format. The in/out time feature is an additional component that can be displayed above the time entry table of the Time Entry Screen. Users who have access to the in/out time feature can log the time they started work and the time they completed tasks or are leaving for the workday. They can then allocate these hours to individual time entries that have been logged to projects. If you select the in/out time feature for this Time Entry Screen, you can further select whether users will manually specify a time for when they arrived and left work or use a clock that will automatically populate the time in the in/out textfields.

Entry format presents users with a short list of dropdown menus that allow that user to select the parameters for a specific entry including the date of the entry. You can choose whether users will be logging total hours worked or the start and stop time for a particular task. Additionally, you can specify whether users will select hours or time worked from dropdowns or will simply specify them in a textbox. The dropdown option for time entry includes the ability to control the increments that are logged (i.e., smallest increment is 15 minutes).

Once you select the type of entry screen, you can specify the format and additional preferences for the Time Entry Screen. Time entry format allows you to set how hours will be entered into the timesheet. The 'HH:MM' setting requires that users enter their time in the 'HH:MM' format. The 'decimal' setting requires that users enter time in decimals; although, the time will be converted to HH:MM after the entries are saved. The 'either' option allows users to enter time in either 'HH:MM' or 'decimal' format. And the 'percent' option requires users to enter time in percentages that must total 100% of the workday for each day. Time entered as a percentage is converted to hours in reports based on the standard length of a day as defined under Configuration→System Settings→Entry Sheets.

The display dates in ascending/descending chronological order setting applies to grid entry format only and determines the order of dates from left to right when entering hours on the time entry screen for those days.

The number of blank entries to display determines how many blank rows will appear on the entry screen for new entries when the screen loads. Generally speaking, there isn't a need to have more than 1 blank row when the entry screen is loaded because new rows are automatically added when users start to fill in the 1 row that is available.

The next group of entry screen settings applies to the rules for uploading documents for specific records on this entry screen. If you choose the unlimited files upload option or specify a number allowed for the period, users will see an Upload and View File Attachments button on their entry screen that will allow them to upload up to the specific number of documents for the sheet approval period. If you do not allow file uploads, users will not see the button or have the option to upload documents to specific records. In this same group of settings, you can also select the file types that are allowed for upload: Images and PDFs, PDFs only or Images only.

There are also certain checkbox options that are related to entry screens. For example, you may not want to display long project descriptions in dropdown selection boxes as it will affect the layout of users' entry screens. Excessively long descriptions can shift other columns sometimes out of immediate sight of the user. You can also opt to display the Project tree within the dropdown selection. By clicking the Projects in the dropdown selection, you can expand and collapse the Project tree. You are also given the ability to use Entry Field Notes, which are different from Comments that can be associated to a task. Entry Field Notes allow users to apply a comment to a specific time entry for a particular day. Customized names for Entry Columns allows you to change the names of the fields/columns only on this screen, overriding the default names from System Settings.

You can also change the display order and hidden status of the column headers that will be shown to users in the Time Entry Screen. Default values can be chosen for all the column headers and a default comment may be specified. This default comment is only used as a default in the event that the column is not displayed (hidden) on a user's time entry screen. Otherwise, the default comment is derived from the user preference.

Each Entry Screen can have its own set of custom names for each Entry Field (column.) These names show up on users' Time / Expense / Mileage Entry Screens, and they can also show up in Reports if the appropriate report option is set. If no custom names are set for a screen then the default names (from System Settings -> Entry Screens) are used instead. In order to set custom names you must first check the checkbox which says 'Use customized names for Entry Columns.' After this is checked you may then fill in the desired names. Be sure to click 'Save' to save the changes..

The system also allows you to attach your own custom HTML to the header and footer of the Time Entry Screen. This feature should be reserved for administrators who are knowledgeable about code; otherwise, the custom HTML may adversely affect other sections of the Time Entry Screen. Once finished, click the Save button. You can use the Preview button to review your changes on an actual time entry screen.

The available tricky tags are given below along with the system information that the 'tricky tag' will display. You must type the tag exactly as shown including capitalization.

<Tricky Tag> - System Information Displayed

<Name> - Displays the login ID of the active user

<Authorization> - Specifically for use by the Journyx Professional Services team

<Reserved> - Specifically for use by the Journyx Professional Services team

<Number of Input Records> - Displays the number of blank rows that appear on this time entry screen for the active user; this number may be set globally for the Time Entry screen or may be left to the individual user to specify for himself

<Number of Output Records> - Specifically for use by the Journyx Professional Services team

<Number of Dates> - Displays the number of days contained in the time period upon which this time entry screen is based

<Full Name> - Displays the full User Name of the active user

<Default Comment> - Displays the default comment that the active user has defined under his preferences tab

<Other Options> - This tag is specifically for use by the Journyx Professional Services team

<Expense Entry GUI in Use> - Displays the name of the Expense Entry screen assigned to the active user

<Time Entry GUI in Use> - Displays the name of the Time Entry screen assigned to the active user

<Domain ID> - Displays the name of the Domain that contains the active user

<Mileage Entry GUI in Use> - Displays the name of the Mileage Entry screen assigned to the active user

<Custom Field Name> - Displays the name of the contents of the named User Custom Field. For instance, if you want to show the contents of the user's custom field "Employee Number"

then use the tag <Employee Number>. Likewise, in order to use the "Email Address" field you can use the tag <Email Address>.

Please note that if you have renamed any of the default custom fields such as renaming "Email Address" to "E-mail" then you must use the renamed field name in the tag. If the user does not have a value set for that Custom Field then the tag will be replaced with a blank value. Any custom field with the same name as one of the standard tags mentioned above will be ignored. Any custom fields with Visibility set to Hidden will not show up. The user must also be assigned a role that is allowed to report on the custom field.

Alternatively, you may also create a new Time Entry Screen by copying the attributes of an existing Time Entry Screen at the top right corner of the screen (see figure 1.2). Once copied, you then only have to change the attributes that will be unique to the new Time Entry Screen.

To modify an existing Time Entry Screen, simply click the name of the Time Entry Screen from the main Time Entry Screen page located under Configuration→Entry Screens→Time Entry Screens (see figure 1.1).

To delete a Time Entry Screen, check the entry screens to delete and click the Delete button (see figure 1.1).

Punch Screens

Punch Entry Screens is located under Configuration→Entry Screens→Punch Entry Screens (see figure 1.3).

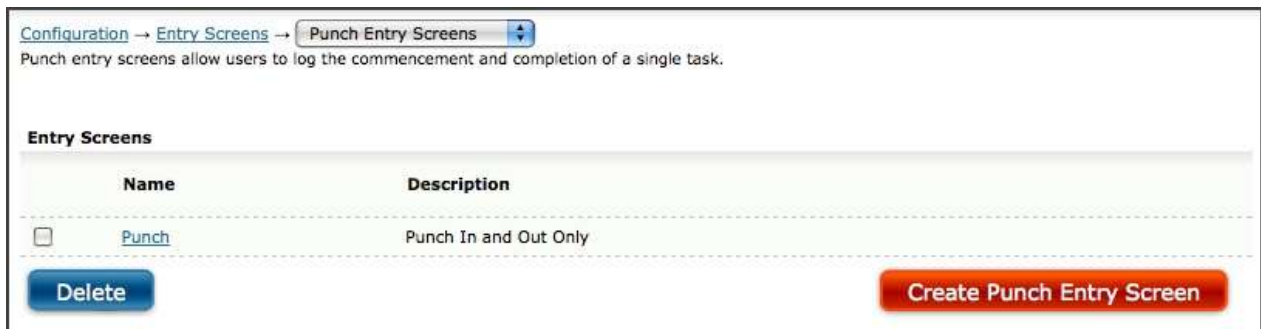


Figure 1.3 Punch Entry Screens main page

Punch Entry Screens are time entry screens that are ideal for non-exempt employees who will typically be using a single terminal to punch-in at the beginning of the workday and punch-out at the end of the workday. In this manner, the Punch Entry Screen simulates the old timed punch clock. The Punch Entry Screen is not complex and is not designed for user flexibility, but rather ease of use.

To create a new Punch Entry Screen, click the Create Punch Screen button located in the lower right corner of the main Punch Entry Screen page. This will direct you to the Punch Screen Creation page where you can specify the attributes of the Punch Entry Screen (see figure 1.4). Specify a name for the Punch Entry Screen. You can then specify to what extent

you wish to show to users' their recent punches. You can also select which additional options will be allowed to the users such as the Timecard Report button or the Accruals button.

Copy the settings of screen: Punch Load

Name:

Description:

☐ Show days of recent punches

☐ Show totals for recent punches

☒ Show button to display recent punch list

☐ Do not show recent punches

Time records are determined by the first punch

☐ Show timecard report button

☐ Show accruals button

Entry Columns

Column Order	Column Name	Default Value	Hide
<input type="text" value="0"/>	Group	All	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	Project	root	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	Activity	Other	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	Pay Type	Other	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	Bill Type	Standard	<input checked="" type="checkbox"/>
<input type="text" value="0"/>	Comment		<input checked="" type="checkbox"/>

Figure 1.4 Punch Entry Screen modification

You may also change the display order and hidden status of the column headers that will be shown to users in the Punch Entry Screen. Default values can be chosen for all the column headers and a default comment may be specified. Punch users by default do not have access to any tabs, so they will not be able to override anything.

Alternatively, you may also create a new Punch Entry Screen by copying the attributes of an existing Punch Entry Screen at the top right corner of the screen. Once copied, you then only have to change the attributes that will be unique to the new Punch Screen.

To modify an existing Punch Entry Screen, simply click the name of the Punch Entry Screen from the main Punch Entry Screen page located under Configuration→Entry Screens→Punch Entry Screens (see figure 1.3).

To delete a Punch Entry Screen, check the entry screens to delete and click the Delete button (see figure 1.3).

Stopwatch Modules

Stopwatch Modules is located under Configuration→Entry Screens→Stopwatch Modules. (see figure 1.5).

Configuration → Entry Screens → Stopwatch Modules

Stopwatch modules allow users to log the commencement and completion of a single task from within a time entry screen.

Entry Screens

Name	Description
<input type="checkbox"/> Start/Stop	Standard Stopwatch

[Delete](#) [Create Stopwatch Entry Screen](#)

Figure 1.5 Stopwatch Modules main page

Stopwatch Modules is an additional component that can be used in conjunction with a standard Time Entry Screen. It allows users via a stopwatch to log the start and stop of a time entry that can contain a Project, Task, Pay Type, Bill Type, and Comment. This is simply a more accurate way of measuring users' time spent on tasks.

To create a new Stopwatch Module, click the Create Stopwatch Module button located in the lower right corner of the main Stopwatch Module page. This will direct you to the Stopwatch Module Creation page where you can specify the attributes of the Stopwatch Module (see figure 1.6). Specify a name for the Stopwatch Module. You can then specify to what extent you wish to show users' their recent punches on the stopwatch screen. You can also select which additional options will be displayed on the stopwatch screen such as Memorized Entries, Timecard Report button, and the Accruals button.

Copy the settings of screen: Start/Stop [Load](#)

Name: Start/Stop

Description: Standard Stopwatch

☐ Show 1 days of recent punches
☐ Show totals for recent punches
☐ Show button to display recent punch list
☒ Do not show recent punches

Time records are determined by the first punch

☐ Show memorized entries
☐ Show timecard report button
☐ Show accruals button

Entry Columns

Column Order	Column Name	Default Value	Hide
0	Group	All	<input checked="" type="checkbox"/>
5	Project	root	<input type="checkbox"/>
0	Activity	Other	<input checked="" type="checkbox"/>
0	Pay Type	Other	<input checked="" type="checkbox"/>
0	Bill Type	Standard	<input checked="" type="checkbox"/>
1	Comment		<input type="checkbox"/>

Figure 1.6. Stopwatch Module modification

You can also change the display order and hidden status of the column headers that will be shown to users in the Stopwatch Module. Default values can be chosen for all the column headers and a default comment may be specified.

Alternatively, you may also create a new Stopwatch Module by copying the attributes of an existing Stopwatch Module at the top right corner of the screen. Once copied, you then only have to change the attributes that will be unique to the new Stopwatch Module.

To modify an existing Stopwatch Module, simply click the name of the Stopwatch Module from the main Stopwatch Module page located under Configuration→Entry Screens→Stopwatch Modules (see figure 1.5).

To delete a Stopwatch Module, check the Stopwatch Modules to delete and click the Delete button (see figure 1.5).

Expense Entry Screens

Expense Entry Screens is located under Configuration→Entry Screens→Expense Entry Screens (see figure 1.7).



Figure 1.7. Expense Entry Screens main page

Expense Entry Screens are the standard entry screens that users can utilize when logging their business related expenses. These screens are highly configurable in order to suit each organization's unique expense tracking process.

To create a new Expense Entry Screen, click the Create Expense Entry Screen button located in the lower right corner of the main Expense Entry Screen page. This will direct you to the Expense Entry Screen Creation page. Specify the name of the Expense Entry Screen (see figure 1.8).

Configuration → Entry Screens → Expense Entry Screens → Expense Modification
Enter values in the fields below and click Save. You can view your settings on an entry screen by clicking on the Preview button.

Copy the settings of screen: Expense Entry Grid – CAS Load

Name:

Display days in order

Number of blank entries to display:

Allow file attachment (receipt image) uploads?
☐ Do not allow file uploads.
☐ Allow unlimited file uploads
☒ Allow uploads; number of attachments allowed per period:

Allowed file attachment types:

- ☒ Add this screen to all new groups
- ☒ Total expenses as they are entered
- ☐ Show Project descriptions in dropdowns
- ☒ Show Project tree in the Project column
- ☒ Allow users to view past periods
- ☒ Allow users to view future periods
- ☒ Use entry field notes
- ☐ Use customized names for Entry Columns

Entry Columns

Column Order	Column Name	Default Value	Hide
<input type="text" value="5"/>	<input type="text" value="Project"/>	<input type="text" value="root"/>	<input type="checkbox"/>
<input type="text" value="4"/>	<input type="text" value="Expense Code"/>	<input type="text" value="Miscellaneous"/>	<input type="checkbox"/>
<input type="text" value="3"/>	<input type="text" value="Source"/>	<input type="text" value="Company"/>	<input type="checkbox"/>
<input type="text" value="2"/>	<input type="text" value="Currency"/>	<input type="text" value="US\$"/>	<input type="checkbox"/>
<input type="text" value="1"/>	<input type="text" value="Comment"/>	<input type="text"/>	<input type="checkbox"/>

Figure 1.8. Expense Entry Screen modification

Once you specified a name, you can select the options for the Expense Entry Screen. You can change the display order and hidden status of the column headers that will be shown to users in the Expense Entry Screen.

The number of blank entries to display determines how many blank rows will appear on the entry screen for new entries when the screen loads. Generally speaking, there isn't a need to have more than 1 blank row when the entry screen is loaded because new rows are automatically added when users start to fill in the 1 row that is available.

The next group of entry screen settings applies to the rules for uploading documents for specific records on this entry screen. If you choose the unlimited files upload option or specify a number allowed for the period, users will see an Upload and View File Attachments button on their entry screen that will allow them to upload up to the specific number of documents for the sheet approval period. If you do not allow file uploads, users will not see the button or have the option to upload documents to specific records. In this same group of settings, you can also select the file types that are allowed for upload: Images and PDFs, PDFs only or Images only.

There are also certain checkbox options that are related to entry screens. For example, you may not want to display long project descriptions in dropdown selection boxes as it will affect the layout of users' entry screens. Excessively long descriptions can shift other columns sometimes out of immediate sight of the user. You can also opt to display the Project tree within the dropdown selection. By clicking the Projects in the dropdown selection, you can expand and collapse the Project tree. You are also given the ability to use Entry Field Notes, which are different from Comments that can be associated to a task.

Entry Field Notes allow users to apply a comment to a specific expense entry for a particular day.

Default values can be chosen for all the column headers and a default comment may be specified. This default comment is only used as a default in the event that the column is not displayed (hidden) on a user's expense entry screen. Otherwise, the default comment is derived from the user preference.

The system also allows you to attach your own custom HTML to the header and footer of the Expense Entry Screen. This feature should be reserved for administrators who are knowledgeable about code; otherwise, the custom HTML may adversely affect other sections of the Expense Entry Screen.

The available tricky tags are given below along with the system information that the 'tricky tag' will display. You must type the tag exactly as shown including capitalization.

<Tricky Tag> - System Information Displayed

<Name> - Displays the login ID of the active user

<Authorization> - Specifically for use by the Journyx Professional Services team

<Reserved> - Specifically for use by the Journyx Professional Services team

<Number of Input Records> - Displays the number of blank rows that appear on this time entry screen for the active user; this number may be set globally for the Time Entry screen or may be left to the individual user to specify for himself

<Number of Output Records> - Specifically for use by the Journyx Professional Services team

<Number of Dates> - Displays the number of days contained in the time period upon which this time entry screen is based

<Full Name> - Displays the full User Name of the active user

<Default Comment> - Displays the default comment that the active user has defined under his preferences tab

<Other Options> - This tag is specifically for use by the Journyx Professional Services team

<Expense Entry GUI in Use> - Displays the name of the Expense Entry screen assigned to the active user

<Time Entry GUI in Use> - Displays the name of the Time Entry screen assigned to the active user

<Domain ID> - Displays the name of the Domain that contains the active user

<Mileage Entry GUI in Use> - Displays the name of the Mileage Entry screen assigned to the active user

<Custom Field Name> - Displays the name of the contents of the named User Custom Field. For instance, if you want to show the contents of the user's custom field "Employee Number" then use the tag <Employee Number>. Likewise, in order to use the "Email Address" field you can use the tag <Email Address>.

Please note that if you have renamed any of the default custom fields such as renaming "Email Address" to "E-mail" then you must use the renamed field name in the tag. If the user does not have a value set for that Custom Field then the tag will be replaced with a blank value. Any custom field with the same name as one of the standard tags mentioned above will be ignored. Any custom fields with Visibility set to Hidden will not show up. The user must also be assigned a role that is allowed to report on the custom field.

Once finished, click the Save button. You can also use the Preview button to review your changes on an actual Expense Entry Screen.

Alternatively, you may also create a new Expense Entry Screen by copying the attributes of an existing Expense Entry Screen at the top right corner of the screen. Once copied, you then only have to change the attributes that will be unique to the new Expense Entry Screen.

To modify an existing Expense Entry Screen, simply click the name of the Expense Entry Screen from the main Expense Entry Screen page located under Configuration→Entry Screens→Expense Entry Screens (see figure 1.7).

To delete an Expense Entry Screen, check the entry screens to delete and click the Delete button (see figure 1.7).

Mileage Entry Screens

Mileage Entry Screens is located under Configuration→Entry Screens→Mileage Entry Screens (see figure 1.9).



Figure 1.9. Mileage Entry Screens main page

Mileage Entry Screens are the standard entry screens that users can utilize when logging their business related travel. These screens are highly configurable in order to suit each organization's unique mileage tracking process.

To create a new Mileage Entry Screen, click the Create Mileage Entry Screen button located in the lower right corner of the main Mileage Entry Screen page. This will direct you to the Mileage Entry Screen Creation page (see figure 1.10).

[Configuration](#) → [Entry Screens](#) → [Mileage Entry Screens](#) → Mileage Modification
Enter values in the fields below and click Save. You can view your settings on an entry screen by clicking on the Preview button.

Copy the settings of screen: Mileage Entry Grid – Kilometers Load

Name:

Display days in ascending order

Number of blank entries to display: User Preference

Allow file attachment uploads?

☐ Do not allow file uploads.

☐ Allow unlimited file uploads

☒ Allow uploads; number of attachments allowed per period:

Allowed file attachment types: PDF documents only

☒ Add this screen to all new groups

☒ Total mileage as it is entered

☐ Show Project descriptions in dropdowns

☒ Show Project tree in the Project column

☒ Allow users to view past periods

☐ Allow users to view future periods

☒ Use entry field notes

☐ Use customized names for Entry Columns

Entry Columns

Column Order	Column Name	Default Value	Hide
5	<input type="text" value="Project"/>	root	<input type="checkbox"/>
2	<input type="text" value="Reason"/>	Contract Negotiation	<input type="checkbox"/>
3	<input type="text" value="Vehicle"/>	Vehicle A	<input type="checkbox"/>
4	<input type="text" value="Measurement"/>	mi	<input type="checkbox"/>
1	<input type="text" value="Comment"/>		<input type="checkbox"/>

Figure 1.10. Mileage Entry Screen modification

Specify the name of the Mileage Entry Screen. Once you specified a name, you can select the options for the Mileage Entry Screen. You can change the display order and hidden status of the column headers that will be shown to users in the Mileage Entry Screen.

The number of blank entries to display determines how many blank rows will appear on the entry screen for new entries when the screen loads. Generally speaking, there isn't a need to have more than 1 blank row when the entry screen is loaded because new rows are automatically added when users start to fill in the 1 row that is available.

The next group of entry screen settings applies to the rules for uploading documents for specific records on this entry screen. If you choose the unlimited files upload option or specify a number allowed for the period, users will see an Upload and View File Attachments button on their entry screen that will allow them to upload up to the specific number of documents for the sheet approval period. If you do not allow file uploads, users will not see the button or have the option to upload documents to specific records. In this same group

of settings, you can also select the file types that are allowed for upload: Images and PDFs, PDFs only or Images only.

There are also certain checkbox options that are related to entry screens. For example, you may not want to display long project descriptions in dropdown selection boxes as it will affect the layout of users' entry screens. Excessively long descriptions can shift other columns sometimes out of immediate sight of the user. You can also opt to display the Project tree within the dropdown selection. By clicking the Projects in the dropdown selection, you can expand and collapse the Project tree. You are also given the ability to use Entry Field Notes, which are different from Comments that can be associated to a task. Entry Field Notes allow users to apply a comment to a specific mileage entry for a particular day.

Default values can be chosen for all the column headers and a default comment may be specified. This default comment is only used as a default in the event that the column is not displayed (hidden) on a user's mileage entry screen. Otherwise, the default comment is derived from the user preference.

The system also allows you to attach your own custom HTML to the header and footer of the Mileage Entry Screen. This feature should be reserved for administrators who are knowledgeable about code; otherwise, the custom HTML may adversely affect other sections of the Mileage Entry Screen.

The available tricky tags are given below along with the system information that the 'tricky tag' will display. You must type the tag exactly as shown including capitalization.

<Tricky Tag> - System Information Displayed

<Name> - Displays the login ID of the active user

<Authorization> - Specifically for use by the Journyx Professional Services team

<Reserved> - Specifically for use by the Journyx Professional Services team

<Number of Input Records> - Displays the number of blank rows that appear on this time entry screen for the active user; this number may be set globally for the Time Entry screen or may be left to the individual user to specify for himself

<Number of Output Records> - Specifically for use by the Journyx Professional Services team

<Number of Dates> - Displays the number of days contained in the time period upon which this time entry screen is based

<Full Name> - Displays the full User Name of the active user

<Default Comment> - Displays the default comment that the active user has defined under his preferences tab

<Other Options> - This tag is specifically for use by the Journyx Professional Services team

<Expense Entry GUI in Use> - Displays the name of the Expense Entry screen assigned to the active user

<Time Entry GUI in Use> - Displays the name of the Time Entry screen assigned to the active user

<Domain ID> - Displays the name of the Domain that contains the active user

<Mileage Entry GUI in Use> - Displays the name of the Mileage Entry screen assigned to the active user

<Custom Field Name> - Displays the name of the contents of the named User Custom Field. For instance, if you want to show the contents of the user's custom field "Employee Number" then use the tag <Employee Number>. Likewise, in order to use the "Email Address" field you can use the tag <Email Address>.

Please note that if you have renamed any of the default custom fields such as renaming "Email Address" to "E-mail" then you must use the renamed field name in the tag. If the user does not have a value set for that Custom Field then the tag will be replaced with a blank value. Any custom field with the same name as one of the standard tags mentioned above will be ignored. Any custom fields with Visibility set to Hidden will not show up. The user must also be assigned a role that is allowed to report on the custom field.

Once finished, click the Save button. You can use the Preview button to review your changes on an actual Mileage Entry Screen.

Alternatively, you may also create a new Mileage Entry Screen by copying the attributes of an existing Mileage Entry Screen at the top right corner of the screen. Once copied, you then only have to change the attributes that will be unique to the new Mileage Entry Screen.

To modify an existing Expense Entry Screen, simply click the name of the Mileage Entry Screen from the main Mileage Entry Screen page located under Configuration→Entry Screens→Mileage Entry Screens (see figure 1.9).

To delete a Mileage Entry Screen, check the entry screens to delete and click the Delete button (see figure 1.9).

Custom Fields

Custom Fields is located under Configuration→Custom Fields (see figure 2.1).

Custom Fields can be created for users and for other objects such as projects, tasks, pay types, bill types, expense codes, sources, currencies, reasons, measurements, and vehicles. A Custom Field can either be a textbox or a dropdown selection.

[Configuration](#) → **Custom Fields**

Custom Fields are additional data tracking fields that can be created for Users, Project, etc. Specify the search criteria for the fields you would like to manage.

Search

Custom Field name or description Custom Field type

Search

Search Results Showing 1 - 10 of 60 custom fields >> Go to Page: of 6 Results Per Page: **Go**

Custom Field name	Custom Field type	Historical associations	Data type	Max length	Element type	Visibility
Allocation Exempt	Pay Types	None	STRING	30	Selection list	Normal
<input type="checkbox"/> Backup ID	Users	None	STRING	252	Text box	Normal
<input type="checkbox"/> Budget	Projects	None	STRING	252	Text box	Normal
<input type="checkbox"/> Customer Name	Projects	None	STRING	252	Text box	Normal
<input type="checkbox"/> Department	Users	None	STRING	252	Text box	Normal
Email Address	Users	None	STRING	252	Text box	Normal
Employee End Date	Users	None	DATE		Text box	Normal
<input type="checkbox"/> Employee Number	Users	None	STRING	252	Text box	Normal
Employee Start Date	Users	None	DATE		Text box	Normal
<input type="checkbox"/> Employee Type	Users	None	STRING	252	Selection list	Normal

0 selected [Select Visible](#) Go to Page: of 6 Results Per Page: **Go**

Delete Custom Field type: **Create**

Figure 2.1. Custom Fields main page

To create a new Custom Field, select the object for which you would like to create the Custom Field and click the Create button in the lower right corner of the screen (see figure 2.2). This will direct you to the Custom Field Creation screen where you can specify the attributes of the Custom Field (see figure 2.3).

Custom Field type: **Create**

Figure 2.2. Custom Field type selection for creation

Figure 2.3 Custom Field creation

Specify a name for the Custom Field which users will find to be intuitive. This name will be the primary identifier for the new Custom Field. Enter a description of what kind of data you intend this Custom Field to contain. Then select a visibility level. The Custom Field can be 'view only', 'hidden', or 'normal'. For example, a Custom Field for users whose visibility is set to 'normal' can be viewed and modified for each user under User Management. This is the standard visibility setting for all Custom Fields. A Custom Field for users whose visibility has been set to 'view only', can be viewed, but not modified, for each user in User Management. This option is best used for fields that are no longer active but which need to be available for reporting purposes. A Custom Field for users that has been set to 'hidden' remains in the database but is hidden both in terms of reporting as well as in terms of value modification for users. Then select the Roles that will have access to the Custom Field for reporting purposes.

Next, choose a data type for the Custom Field. There are five data types available for Custom Fields:

String

A string field is a text field that can contain any type of character. String fields are limited to a certain number of characters as defined in the maximum length (if string) setting for each individual Custom Field.

Fixed Length String

A fixed length string field is a text field that can contain any type of character. Unlike a string field, fixed length string fields will always contain the exact number of characters as defined in the maximum length (if string) setting for each individual Custom Field. The system will pad the entered value with spaces to achieve the maximum length. Therefore, if you configure a fixed length string field to have a length of 24 and only one character is entered, the actual entry will be stored in the database as that character plus twenty-three additional spaces.

Date

A date field is a field that is configured to hold a date value in the globally defined short date format (MM/DD/YYYY by default).

Number

A number field is a field that is configured to contain a numerical value. The exact size limit for a number field is limited to the maximum value supported by your database for double-precision numbers.

Integer

An integer field is configured to contain a numerical value, but limited to whole numbers only. The exact size limit for an integer field is limited to the maximum value supported by your database for double-precision numbers.

When finished selecting the data type, you must select the form type of the Custom Field. A Custom Field can be a textbox, dropdown selection or multi-value selection. If a textbox, you can specify a default value that will appear in the Custom Field textbox when shown to users. If a dropdown selection or multi-value selection, you can add multiple values and designate one of the values as the default. Dropdown selections only allow you to set a single field value from the list. Multi-value selections allow you to use CTRL + click to set one or more field values from the list. When finished, click the Save button.

To modify an existing Custom Field, you must first specify the search criteria for the Custom Field and click the Search button on the main Custom Fields page located under Configuration→Custom Fields (see figure 2.1). From the search results, you can click the name of the Custom Field to modify.

To delete a Custom Field, select the Custom Fields to delete from the search results and click the Delete button (see figure 2.1).

Policies and Rules

Policies and Rules management is located under Configuration→Policies→Manage Rules and Policies (see figure 3.1).

Journyx provides a robust engine for creating and applying complex payroll and billing rules that can be applied to time tracked by users. Policies and Rules are at the very heart of the

Rates & Rules Module of system. Administrators can create Rules that affect how time is handled for payroll or billing purposes. These Rules are then combined into a Policy, which can be assigned to users. Once a Policy has been assigned, each user's time and billing is processed appropriately according to the Rules within the Policy.

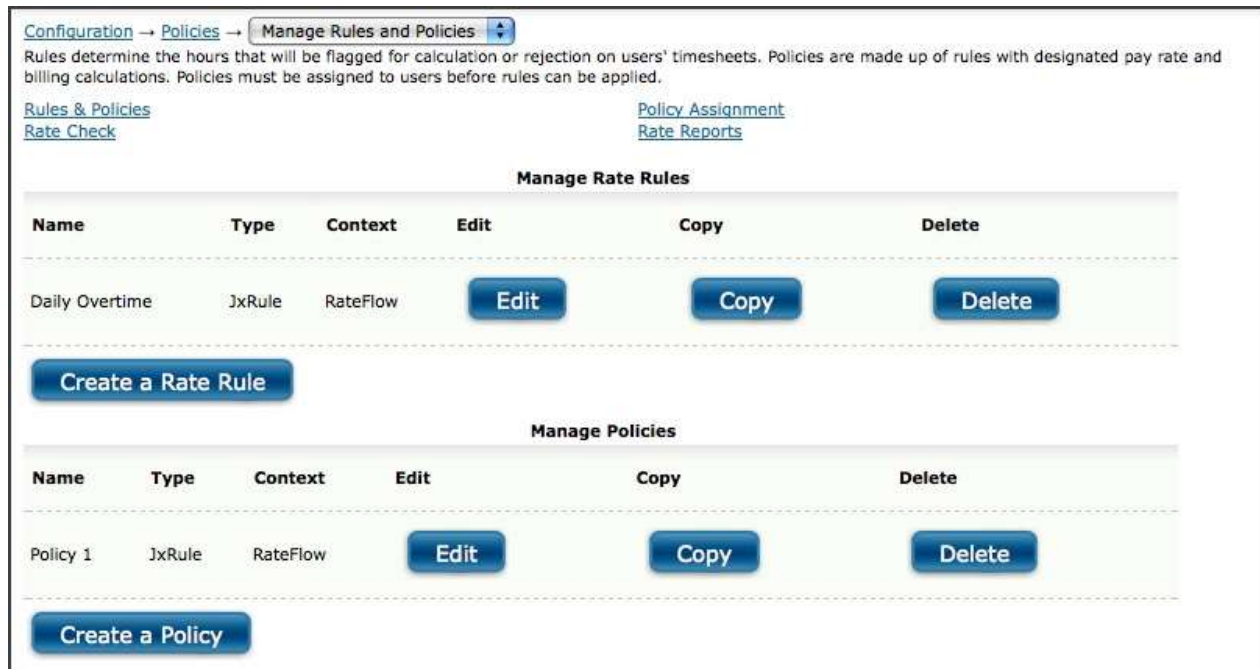


Figure 3.1. Rules and Policies main page

For the Rates & Rules Module to function properly users whose time will be affected by Policies must have values in the Custom Fields of User Pay Rate and User Bill Rate assigned to them. These fields can be accessed when creating or modifying users under Management→Users→User Management. Additionally, if your organization intends to use project-based Pay Rates and Bill Rates, you will need to add values to the Custom Fields Project Pay Rate and Project Bill Rate for the Projects. These fields can be accessed when creating or modifying the Project. Without these rates and fields in place, the Rates & Rules Module will not have the appropriate values to derive the complex mathematical procedures required to apply Rules to users' time.

This section under Configuration contains five main subsections: Rules, Policies, Policy Assignment, Rate Check, and Rate Reports. In order to use this Module, the first step is to create and manage Rules. As you are working with Rules, you must always keep in mind how the subsequent Policies will be designed, since it will be the Policy containing the Rules which will be directly assigned to the user. A user can only have one Policy assigned to him/her. Journyx recommends developing a strategy for Rule and Policy creation that focuses on the primary categories of users within your organization; that is, a strategy that looks at how users are grouped in ways that directly affect their time for payroll and billing purposes. An example of such a strategy would be the creation of a Policy that relates specifically to non-exempt users, who are subject to overtime considerations, and salaried users, who are not subject to overtime considerations. Once the Rules have been created, you will create a Policy that will be comprised of multiple Rules. Afterwards, you can then assign that Policy to users. Once you have assigned the Policy, you can do a Rate Check to see how a particular user's pay rate can

be affected. Finally, Rate Reports allow you to run a report that will display the actual Pay Rate and Bill Rates as applied selected users' time records over a duration of time.

Rules Management

Rules can be managed under Configuration→Policies→Manage Rules and Policies (see figure 3.1). On this main screen, you can view all existing Rate Rules and Policies. Rules are used to specify particular parameters for calculations and compliance checks that should be applied to time records for payroll and/or billing purposes. To create a new Rule, click the Create a Rate Rule button located under all the existing Rules. This will direct you to the Rate Rule Creation screen (see figure 3.2).

Name the Rule

Name: Description:

Select Time Parameters for Rule

Timeframe	Condition	Trigger Hours	Day	Date(s)	Target
Timesheet	Greater than	0	*Any* Week Day Weekend Day Sunday	07/20/2010 Add To Day List	Excess Hours

Define the Rule

Project	Activity	Pay Type	Bill Type
Any root sp1 sp1 task 1 sp1 task 2 sp2	*Any* Clerical Coding CorpAdmin Debugging Design/Plan	*Any* Family Leave Holiday Jury Duty Military Duty Other	*Any* Billable Billed Emergency On-Call Standard

☐ Automatically Include Project Descendants in Rule?

Select Optional Actions

Select/Description	Action Parameters
<input type="checkbox"/> Automatically Reject Timesheet if any Hours meet conditions of Rule	<input type="text"/>
<input type="checkbox"/> Automatically Accrue Target Hours in a defined Accrual	Family Leave

Figure 3.2. Rule creation screen

Here you can set up all the parameters that define a Rule. The Name and Description of a Rule are used to identify the Rule, particularly when creating Policies. Please note that Rules, Policies and Rate Reports cannot have duplicate names. If you attempt to name one of these items with a name already assigned to a different item, you will receive an error message.

The Time Frame, Condition, Trigger Hours, Day, Dates, and Target are used to define the Rule. For example, let's say that Time Frame is 'day', Condition is 'greater than', Trigger Hours is '8', Day is 'any', and Target is 'excess hours'. Translated, this means that the Rule will be applied to any hours worked in excess of 8 hours for any single day. Once you have

specified the parameters of the Rule, you must select which objects the Rule will be applied to. You can select the Projects, Tasks, Pay Types, and Bill Types for which this Rule will be applied. You may use shift-click and ctrl-click functionality to select multiple items.

The Day and Date settings are mutually exclusive, so you need only make selections from one of these fields for each rule. You can add more than one date to the Date field for a single rule by selecting the date from the calendar and clicking on the Add to Day List button.

Additionally, you have Optional Actions that can be assigned to the Rule. You can have the timesheet rejected if any hours meet the conditions of the Rule. This is known as a Rejection Rule. You can also have the Target hours accrue to one of the user's Accrual Types if any hours meet the conditions of the Rule. When finished, click the Save button. Alternatively, you may create a new Rule by clicking the respective Copy button on the main Rule and Policy Management screen. This will direct you to the Rule Creation screen with the parameters and definitions pre-populated, from which point you can create a new Rule.

To modify an existing Rule, click the respective Edit button on the main Rule and Policy Management screen (see figure 3.1). This will direct you to the Rule Management screen where you can make the necessary modifications.

To delete an existing Rule, click the respective Delete button on the main Rule and Policy Management screen (see figure 3.1).

Policy Management

Policies can be managed under Configuration→Policies→Manage Rules and Policies (see figure 3.1).

On this main screen, you can view all existing Rate Rules and Policies. A Policy is a logical grouping of Rules that is used to apply the rules to users' hours for payroll and billing purposes. Each Policy provides options to make rate modifications for payroll as well as the potential for up to three unique billing rate modifications. Each user can have only one Policy assigned to him/her. Therefore, Policies should be designed and assigned keeping this in mind since this would affect which Rules are assigned to a Policy.

To create a new Policy, click the Create a Policy button located under all the existing Policies. This will direct you to the Policy Creation screen (see figure 3.3). Here you can set up all the parameters that define a Policy.

Figure 3.3. Policy creation screen

The Name and Description of a Policy are used to identify the Policy, particularly when assigning Policies to users. The Name should be unique and help to identify the target users for the Policy. Examples might include: hourly, salary, exempt, non-exempt, contractors and senior staff. Please note that Rules, Policies and Rate Reports cannot have duplicate names. If you attempt to name one of these items with a name already assigned to a different item, you will receive an error message.

You must select a Pay Rate preference for the Policy. Since a user can have his/her own Pay Rate and the Project that the user has logged time against can have its own Pay Rate, you must select which Pay Rate to use for the Policy. The system also allows you some flexibility in choosing this preference. If 'user' is selected, the system will use the Pay Rate assigned to the user whose timesheet is being affected by each Rule. If 'project' is selected, the system will use the Pay Rate assigned to each Project associated with the hours contained in the timesheet that is being affected by the Rule. If 'greater' is selected, the system will compare the Pay Rates for both the user and the Project associated with the timesheet that is to be affected by this Policy and will use the greater of the two. If 'lesser' is selected, the system will compare the Pay Rates for both the user and the Project associated with the timesheet that is to be affected by this Policy and will use the lesser of the two. If 'prefer project' is selected, the system will use the Pay Rate assigned to the Project that is associated with the hours in the timesheet that is to be affected by this Policy. If a Pay Rate for the Project does not exist, then the system will use the Pay Rate assigned to the user. If 'prefer user' is selected, the system will use the Pay Rate assigned to the user whose timesheet is to be affected by this Policy. If a Pay Rate for the user does not exist, the system will use the Pay Rate assigned to the Project associated with the hours contained in the timesheet.

Similarly, you must select a Bill Rate preference for the Policy. Since a user can have his/her own Bill Rate and the Project that the user has logged time against can have its own Bill Rate, you must select which Bill Rate to use for the Policy. The system also allows you some flexibility in choosing this preference. If 'user' is selected, the system will use the Bill Rate assigned to the user whose timesheet is being affected by each Rule. If 'project' is selected, the system will use the Bill Rate assigned to each Project associated with the hours contained in the timesheet that is being affected by the Rule. If 'greater' is selected, the system will compare the Bill Rates for both the user and the Project associated with the timesheet that

is to be affected by this Policy and will use the greater of the two. If 'lesser' is selected, the system will compare the Bill Rates for both the user and the Project associated with the timesheet that is to be affected by this Policy and will use the lesser of the two. If 'prefer project' is selected, the system will use the Bill Rate assigned to the Project that is associated with the hours in the timesheet that is to be affected by this Policy. If a Bill Rate for the Project does not exist, then the system will use the Bill Rate assigned to the user. If 'prefer user' is selected, the system will use the Bill Rate assigned to the user whose timesheet is to be affected by this Policy. If a Bill Rate for the user does not exist, the system will use the Bill Rate assigned to the Project associated with the hours contained in the timesheet.

The next step is to assign the Rules that will comprise the Policy. Keep in mind that these Rules must have already been created. When assigning Rules to a Policy, it is important to note that Rules within a policy are executed from 'top to bottom'. In other words, the first Rule in a Policy is applied to the hours first, the second Rule is applied next, and so on down the list. This can be particularly important, as the order of mathematical operations can critically affect Pay Rate and Bill Rate amounts. Each Rule in a Policy must have at least one operation assigned to it. In other words, every Rule must have at least a modification to one Rate.

The Edit Order column defines which Rule will be applied first, which Rule will be applied next, etc. From the choices in the dropdown selection, you are able to insert, delete, move up, or move down a Rule that has been assigned to the Policy. Once the selection is made, your entire row will be modified immediately. The Rule column allows you to select an existing Rule to assign to the Policy. The Rules will determine which hours should be modified for payroll and billing. The Payroll Adjustment Type determines how the hours affected by the Rule will be modified for payroll calculations. 'Override' replaces the hourly Pay Rate with the new value specified in the Payroll Adjustment Amount column. 'Add' increases the hourly Pay Rate by the amount specified in the Payroll Adjustment Amount column. 'Multiply' multiplies the hourly Pay Rate by the amount specified in the Payroll Adjustment Amount column. The Payroll Adjustment Amount determines the amount by which the Payroll Rate should be modified. This field accepts both positive integers and decimal values. If you have selected a Rejection Rule, then the Payroll Adjustment Type will automatically be set to 'reject'.

Billing Adjustment Type #1 determines how the hours affected by the Rule will be modified for the first Billing calculation. 'Override' replaces the hourly Billing Rate with the new value specified in the Billing Adjustment Amount #1 column. 'Add' increases the hourly Billing Rate by the amount specified in the Billing Adjustment Amount #1 column. 'Multiply' multiplies the hourly Billing Rate by the amount specified in the Billing Adjustment Amount #1 column. The Billing Adjustment Amount #1 determines the amount by which the Billing Rate should be modified. This field accepts both positive integers and decimal values. If you have selected a Rejection Rule, then the Billing Adjustment Type will automatically be set to 'reject'.

Billing Adjustment #2 and Billing Adjustment #3 are handled similarly.

Please note that any Rule that does not directly affect a Pay or Bill rate (i.e., an automatic rejection or an automatic accrual rule) must have an actual Adjustment Type and Adjustment Amount associated with that rule. Journyx recommends using either 'Add 0' or 'Multiply by 1' for these types of Rules, as both operations will not affect the rates in question.

You can continue adding Rules to the Policy as needed by repeating the steps above. Once all the required Rules have been added to the Policy, click the Save button.

To modify an existing Policy, click the respective Edit button on the main Rule and Policy Management screen (see figure 3.1). This will direct you to the Policy Management screen where you can make the necessary modifications.

To delete an existing Policy, click the respective Delete button on the main Rule and Policy Management screen (see figure 3.1).

Assigning Policies to Users

Once you have created Rules and a Policy, the Policy should be assigned to users who will be subject to its Rules. Each user can have only one Policy assigned to him/her. As stated before, the most common strategy for Policy assignment is to break your users into discreet categories based upon their employee type (full-time hourly, exempt, salaried, contractor, etc.)

To assign a Policy to users, click the Policy Assignment link located at the top of any of the Rates, Rules, or Policy screens. This will direct you to a user search screen where you can specify the search criteria for the users that you would like to assign to the Policy (see figure 3.4).

Search

User name

contains

Project

is anything

root

sp1

sp1 task 1

sp1 task 2

Group

is anything

All

RM Group for 1, u

RM Group for 2, u

Search

Search Results

Showing 1 - 3 of 3 Users

Results Per Page: 200Go

Name	Rate Rule
<input type="checkbox"/> 1, u	none
<input type="checkbox"/> 2, u	none
<input type="checkbox"/> meredith	none

0 selected

Select All

Results Per Page: 200Go

Assign Users to Policy >

--No Policy--

Figure 3.4. Assigning Policies to users

After specifying the search criteria, click the Search button. The search results will be displayed below the search criteria. Select the users to assign to the Policy and select the appropriate Policy at the bottom of the page before clicking the Assign Users to Policy button. You can also assign existing Policies to new users as they are created on the User Creation page under User Management.

Rate Check

After you have created Policies and assigned them to your users, you will want to check the final results of this process. The system provides a simple interface for determining exactly how the Policy assigned to each user affects the Pay and Bill rates for those users. To perform a Rate Check, click the Rate Check link located at the top of any Rates, Rules, or Policy screen (see figure 3.5). It is also located under Configuration→Policies→Rate Check.

Search

User name

Project

Group

Search

Search Results Showing 1 - 3 of 3 Users Results Per Page: **Go**

Name	Policy	Max Pay Rate	Min Pay Rate	Max Bill 1 Rate	Min Bill 1 Rate	Max Bill 2 Rate	Min Bill 2 Rate	Max Bill 3 Rate	Min Bill 3 Rate
1, u	-none-	-	-	\$100	\$100	\$100	\$100	\$100	\$100
2, u	-none-	-	-	\$200	\$200	\$200	\$200	\$200	\$200
meredith	-none-	-	-	-	-	-	-	-	-

Results Per Page: **Go**

Figure 3.5. Rate Check screen

The Rate Check screen gives you an 'at a glance' overview of the maximum and minimum for each user's Pay Rate as well as each of the three possible Bill Rates for those users. You also have the ability to filter for particular users by specifying search criteria and clicking the Search button. The search results will be displayed under the search criteria. If a rate is shown as having a minimum of '-', check to see if an 'hourly' Pay Rate and Bill Rate has been assigned to that user under Management→Users→User Management. These settings will be located in the Custom Fields section when managing a specific user. Without an actual 'hourly' Rate assigned to the user(s), the system cannot effectively determine what the minimum and maximum values are for each particular rate category.

If the rates displayed on the Rate Check screen appear to be excessively high or low, you may need to modify any Policies that are associated with users who are shown to have these suspect rates. Remember, modification of rates by Policies is subject to standard mathematical rules as well as the order in which they appear in each Policy. The Rate Check screen indicates which Policy is assigned to each user and provides a link to edit the Policy.

Rate Reports

Rate Reports is located under Reports→Rate Reports.

You can also click the Rate Reports link located at the top of any Rates, Rules, or Policy screen. Rate Reports display the pay rate, bill rate, amount paid, hours worked and the Rule that was applied to each user's time records in the report (see figure 3.6).

Search

Rate Report name or description

Search

Run Report Options

☐ Save report output

Saved report output description:

Search Results Showing 1 - 2 of 2 rate reports Results Per Page: **Go**

<u>Report Name</u>	<u>Run Report</u>	<u>Description</u>	<u>Data Range Dates</u>
Approval	Run Report	Default report for the approval screen.	
Preview	Run Report	Default report for timesheet preview screen.	

0 selected [Select All](#) Results Per Page: **Go**

Delete **Create a Rate Report**

Figure 3.6. Rate Report main page

Initially, there are two default Rate Reports named 'Approval' and 'Preview' on the main Rate Reports screen. The 'Approval' report is directly associated with the Approvals process and can be viewed by designated Approvers in the system when viewing a user's timesheet. This report can be modified to affect certain aspects of the display that Approvers see when they are viewing a submitted timesheet. However, the date range and user selection portions of this report are locked and changing them in the management screen will not make actual modifications to the report. The 'Preview' report allows users to view the rate calculations applied to a given timesheet by using the 'View Time Report' feature. The Rate Report is displayed below the time report. As is the case with the 'Approval' report, the date range and user selection portions cannot be changed. If you do not wish either approvers or users to be able to view these default reports, you can change the groupings and columns to display nothing.

To create a new Rate Report, click the Create a Rate Report button located on the main Rate Reports screen located under Reports→Rate Reports. This will direct you to the Rate Report Creation screen where you can specify the dates, filters, and options of the Rate Report (see figure 3.7).

Report name:

Report description:

Define Date Range for Report:

☒ Quick Pick: This week

☐ Relative Dates: Start: First day of ... Current Year; End: Last day of ... Current Year

☐ Fixed Dates: Start: 07/20/2010; End: 07/20/2010

Report Filters

User: *All*, 1, u, meredith

Project: *All*, root, sp1, sp1 task 1, sp1 task 2, sp2

Activity: *All*, Clerical, Coding, CorpAdmin, Debugging, Design/Plan

Pay Type: *All*, Family Leave, Holiday, Jury Duty, Military Duty, Other

Bill Type: *All*, Billable, Billed, Emergency, On-Call, Standard

Report Output Options

Primary grouping: User

Secondary grouping: -none-

Tertiary grouping: -none-

Columns to display: Hour Totals, Pay Totals, Pay Rate, Bill Rate 1 Totals, Bill Rate 2 Totals, Bill Rate 3 Totals, Bill Rates

Custom fields to display: ACTIVITY FIELDS, QuickBooks File ID, QuickBooks ID; BILL TYPE FIELDS, QuickBooks File ID, QuickBooks ID

First day of week for report: Sunday

Timesheet status on which to report: All Records

☐ Show item descriptions after names

☐ Automatically Include Project Descendants in Report

Additional header HTML: Standard journyx.com report header

Figure 3.7. Rate Report creation screen

First, you must specify a name and description for the Rate Report. Please note that Rules, Policies, and Rate Reports cannot have duplicate names. You have three options when selecting a date range for the report: Quick Pick, Relative Dates, and Fixed Dates. Quick Pick allows you to specify simple choices for the date range for this report. You may select this week, last week, this month, and last month. Relative Dates allow you to specify a date range that runs from the first day to the last day of typical time periods such as year, quarter, month, and week. Fixed Dates provides you the most flexibility by allowing you to enter a specific date range.

You can additionally filter the data that is being shown in the report in the Report Filters section. These filters allow you to select specific Users, Projects, Tasks, Pay Types, and Bill Types that you want reported on. You can use shift-click or ctrl-click functionality to select multiple items in the listboxes.

In the Report Output Options section, you can select grouping mechanisms and specify display options for the data which will be shown in the Rate Report. The grouping rules

specify the method in which data should be organized. A primary grouping must be selected, whereas the secondary and tertiary groupings are optional. The possible groupings options are User, Project, Task, Pay Type, Bill Type, Year, Month, Week, Day, and Rule. Please note that no two groupings can be set to the same selection. You can then select which columns to display in the report. When finished setting the Rate Report, click the Save button.

To modify the settings of an existing Rate Report, simply click the report name on the main Rate Reports screen (see figure 3.6).

To run a Rate Report, you can specify a name and format in the Run Report Options on the main Rate Reports screen (see figure 3.6). Then click the respective Run Report link.

To delete a Rate Report, select the report on the main Rate Reports screen and click the Delete button (see figure 3.6).

Roles

Roles management is located under Configuration→Roles.

Every individual who will access the system is considered a user. Users can have one of several different roles that determine what abilities and access they will have. The default roles available in the system are: User, Time User, Memorized Sheet User, Punch User, Manager, Project Manager, Reporter, Timekeeper, and Administrator (see figure 4.1).

Configuration → Roles

Roles define users' functional privileges. Standard roles are those that are default to the system and have predefined abilities. Custom roles can be configured to have various abilities.

Role Name	Description	Number of Users	Abilities
Administrator	Access to the entire system	1	<ul style="list-style-type: none"> Access - Dashboard Access - Details Access - Entry Screens Access - Expense Entry Access - Extra Link
Dashboard User	User that can view the Dashboard	0	<ul style="list-style-type: none"> Access - Dashboard Access - Details Access - Entry Screens Access - Expense Entry Access - Extra Link
DC Access	Full access to Disconnected User module	0	<ul style="list-style-type: none"> Corrections - Expense Corrections - Mileage Corrections - Time Currency Conversion - Controller DC - Expense
Time User	Time entry user	0	<ul style="list-style-type: none"> Access - Dashboard Access - Details Access - Entry Screens

Figure 4.1. View standard roles

Below is a list of the available roles and a summary of the abilities that each role possesses.

Keep in mind that the abilities assigned to the default roles cannot be modified. If you need to create a specialized role other than a default role, you will need to create a Custom Role.

User

- Time, expense, and mileage entry functions for self only
- Limited number of reports limited to self-reporting only
- Access to Project Notes
- Password reset for self only
- Access to User Detail fields under Preferences
- Limited number of personal preferences
- Limited number of administrative tasks for self only

Time User

- Same access and abilities as the default User role above except no access to expense or mileage entry

Memorized Sheet User

- Same access and abilities as the default User role except additional access to create and modify Memorized Sheets for self

My Assignments User

- Access to the My Assignment screen only
- MUST be combined with another role (e.g., User or Scheduled Project Management User)

Punch User

- Access to assigned Punch Entry Screen only

Manager

A Manager serves as a low level administrator over users only. Managers can only manage users in the Groups for which the Managers have been assigned to by an Administrator. A Manager has access to all the functions of a User role plus the following:

- Accrual management for users in Groups that he/she is managing
- A number of reports that relate to both self and to Groups he/she is managing
- User modification, including access to all Custom Fields for users in groups he/she manages
- Password reset for self and users in any Groups he/she manages
- Time, expense, and mileage record creation for users in Groups he/she manages
- Memorized Entry creation for users in Groups he/she manages
- Memorized Sheet creation for Groups he/she manages
- Punch record conversion for users in Groups he/she manages

Project Manager

A Project Manager serves in the same capacity as a Manager, but also has the ability to create and modify projects in Groups for which the Project Managers have been assigned to by an Administrator. A Project Manager has access to all the functions of a Manager role, plus the following:

- Project creation and modification
- A number of reports that relate to projects

Scheduled Project Management User

- Same access and abilities as the default Project Manager role except additional access to Scheduled Project Management and Resource Requisitions

Reporter

A Reporter has access to very few of the traditional user functions of the system, but has full access to the reporting engine. A reporter cannot enter time or any other data except Project Notes, but he/she can view reports on any data contained in the Groups to which he/she has been assigned. This will allow the Reporter to view all time, expense, and mileage entries for users that have been assigned to the same Group as the Reporter. A reporter has access to:

- Reports that display information relating to all users and projects in Groups that the Reporter has been assigned to by an Administrator
- Password reset for self only
- Project Notes

Dashboard User

- Access to the Dashboard screen only
- MUST be combined with another role (e.g., User or Scheduled Project Management User)

Timekeeper

A Timekeeper exists solely to enter time for other users. A Timekeeper may perform this action for any user contained in the Groups to which he/she has been assigned. A Timekeeper has access to the following:

- Time entry for self
- Time entry for other users in his/her Groups
- Password reset for self
- Reports that relate to self as well as those for whom he/she can enter time for

Administrator

An Administrator serves as a master controller for the system. Although an Administrator has access to many configuration parameters of the system, an Administrator cannot enter time, expense, or mileage for self. An Administrator has access to the following:

- User creation and modification
- Timekeeping for all users
- Timesheet approval for all users (regardless of the designated approver in the Approval Plan)
- Expense keeping and Mileage keeping for all users
- Project creation and modification
- Approval Plan creation and modification
- Group creation and modification
- Field Value creation and modification
- Reports that relate to any Group, project or user in the system
- Accruals
- Rate Rules and Policy creation and modification
- Password reset for self and for all users
- Custom role creation
- Period and Entry Screen definitions
- Import tools
- System Settings modification

Group membership for roles can determine which features a single employee has access to. For example, you can have an employee that is assigned to two roles - Manager and Reporter. If the employee belongs to one Group that includes the Manager role, he will have access to the standard manager functions for the users in that Group. However, if he belongs to a second Group that includes the Reporter role and does not contain the Manager role, he will only have access to report on the users in that second Group. You can also create Custom Roles that are assigned to specific Groups (i.e., a Custom Role named "Manager of Group 1"). By assigning the Role to your Group 1 manager and including it in Group 1 only, you ensure that this employee can manage the other employees under his/her supervision without being able to access those that are not (i.e., managers in an "all managers" group to which he also belongs).

Below is a list of Roles and Authorities in more detail.

Role Ability	Description
<i>Approvals Management</i>	
Approver - Regular	The <i>Approver - Regular</i> role ability allows the approval of Time, Mileage and Expense sheets that have been submitted to the user by others who have this user as their assigned approver.
Approver - Super	The <i>Approver - Super</i> role ability allows the approval of Time, Mileage and Expense sheets that have been submitted by any user within the Timesheet database.
<i>Role Authority</i>	
Authority - Administrator	The <i>Authority - Administrator</i> role ability provides the ability to execute administrator level functions and system software adjustments, such as license key changes and global preference modifications.
Authority - Expense keeper	The <i>Authority - Expense keeper</i> role provides the ability to enter expense records for other users in same group as the user to whom this role has been assigned.
Authority - Manager	The <i>Authority - Manager</i> role ability provides the ability to execute manager level functions, including reporting on and modification of users who are share group membership in at least one group as the manager.
Authority - Mileage keeper	The <i>Authority - Mileage keeper</i> role provides the ability to enter mileage records for other users in same group as the user to whom this role has been assigned.
Authority - Punch User	The <i>Authority - Punch User</i> role ability provides the ability to use the punch screen interface.

Authority - Reporter	The <i>Authority - Reporter</i> role ability provides limited reporting ability without Time, Mileage, or Expense Entry access.
Authority - Timekeeper	The <i>Authority - Timekeeper</i> role provides the ability to enter time records for other users in same group as the user to whom this role has been assigned.
Authority - User	The <i>Authority - User</i> role provides Time, Expense and Mileage entry access to the user to whom this role has been assigned.
Access	
Details Tab	Displays the Details tab under Preferences in the navigation menu. The tab gives the user information about objects they can access in the system.
Entry Screens Tab	Displays the Entry Screens tab under Preferences in the navigation menu. The tab gives the user access to options for entry screen customization. For example, users can change the Time Entry Screen they are using on this screen if they have access to more than one in their Groups.
Expenses Tab	Displays the Expenses tab in the navigation menu, which provides access to the Expense Entry screens. Withholding Expenses Tab access is useful if your organization does not wish to implement expense tracking.
Extra Link	Displays the Extra Link in the user's toolbar as defined in System Settings.
Leave Requests Tab	Displays the Leave Requests-->Request Time Off and Leave Request Calendar tabs under Management in the navigation menu. While Administrators, Managers and Reporters will be able to see the Leave Request Calendar (for reporting purposes only) without this ability, no one can request time off without access to Leave Requests and Time Entry.
Logout Link	Displays the <i>Logout</i> link at the top right corner of the screens.
Management Tab	Displays the Management tab in the navigation menu. This tab provides access to a list of subtabs that are dependent upon the user's role in the system and may include any of the following: Users, Groups, Projects, Field Values, Approval Plans, My Sheets, Memorized Sheets, Memorized Entries, Leave Requests, Domains or Custom Tools.
Mileage Tab	Displays the Mileage tab in the navigation menu, which provides access to the Mileage Entry screens. Withholding Mileage Tab access is useful if your organization does not wish to implement mileage tracking.
Reset Password Tab	Displays the Reset Password link under Preferences in the navigation menu. Withhold this access ability when you do not want users to reset their own passwords.
Project Notes Tab	Displays the Project Notes tab under Projects. This tab gives users the ability to add extended documentation in Project "notebooks". Other users who have access to the same projects can then read each others' notes.
Reports Tab	Displays the Reports tab in the navigation menu. Withhold this access ability when you do not want users to run reports.
Time Tab	Displays the Time Entry tab in the navigation menu. Withhold this access ability when you do not want users to log time entries.
Prior Period Adjustments (Corrections)	
Corrections - Expense	The <i>Corrections - Expense</i> role ability provides the user to whom this role ability has been assigned with the ability to make adjustments to previously approved Expense Entries. Changes can be made to expense records created by any user within the Timesheet database.
Corrections - Mileage	The <i>Corrections - Mileage</i> role ability provides the user to whom this role ability has been assigned with the ability to make adjustments to previously approved Mileage Entries. Changes can be made to mileage records created by any user within the Timesheet database.
Corrections - Time	The <i>Corrections - Time</i> role ability provides the user to whom this role ability has been assigned with the ability to make adjustments to previously approved Time Entries. Changes can be made to time records created by any user within the Timesheet database.
Conversions Table Maintenance	
Mileage Conversion - Controller	The <i>Mileage Conversion - Controller</i> role ability provides users whose role contains this role ability with the ability to create and modify Mileage conversion tables.
Currency Conversion - Controller	The <i>Currency Conversion - Controller</i> role ability provides users whose role contains this role ability with the ability to create and modify Currency conversion tables.
Disconnected Client Module Access	
DC - Expense	The <i>DC-Expense</i> role ability provides access to Disconnected Client Expense Entry forms for users whose role has been assigned this role ability. Note: To use <i>any</i> DC role abilities, your organization must have purchased the Disconnected Client optional module for Timesheet.

DC - Mileage	The <i>DC-Mileage</i> role ability provides access to Disconnected Client Mileage Entry forms for users whose role has been assigned this role ability. Note: To use <i>any</i> DC role abilities, your organization must have purchased the Disconnected Client optional module for Timesheet.
DC - Project	The <i>DC-Project</i> role ability provides access to Disconnected Client Project Creation forms for users whose role has been assigned this role ability. Note: To use <i>any</i> DC role abilities, your organization must have purchased the Disconnected Client optional module for Timesheet.
DC - Time	The <i>DC-Time</i> role ability provides access to Disconnected Client Time Entry forms for users whose role has been assigned this role ability. Note: To use <i>any</i> DC role abilities, your organization must have purchased the Disconnected Client optional module for Timesheet.
<i>Projectlink Module Access</i>	
MSPProject Sync Admin	The <i>MSPProject Sync Admin</i> role ability provides access to the Projectlink synchronization functions of Timesheet. The MSPProject Sync Admin can create and modify users and projects/tasks. Note: To use Projectlink synchronization, your organization <i>must</i> have purchased Projectlink for Timesheet.
MSPProject Sync User	The <i>MSPProject Sync User</i> role ability provides access to some of the Projectlink synchronization functions of Timesheet. The MSPProject Sync User can modify users and projects/tasks. MSPProject Sync Users cannot create new users or tasks via the Projectlink sync. Note: To use Projectlink synchronization, your organization <i>must</i> have purchased Projectlink for Timesheet.
<i>Rate Reporting</i>	
Modify Rate Report	The <i>Modify Rate Report</i> role ability provides users whose role contains this role ability with the ability to modify rate reports.
Run Rate Check Report	The <i>Run Rate Check Report</i> role ability provides users whose role contains this role ability with the ability to run the Rate Check Report in Timesheet.
Run Rate Report	The <i>Run Rate Report</i> role ability provides users whose role contains this role ability with the ability to run all existing rate reports within Timesheet.
<i>Password Controls</i>	
Password Change	The <i>Password Change</i> role ability allows users whose role contains this ability to change the password of other Timesheet users to whom they have access based on group membership.
<i>Approvals Controls</i>	
Sheet approval Management	The <i>Sheet approval Management</i> role ability provides the ability to create, modify and assign sheet approval templates to other Timesheet users to whom they have access based on group membership. Note: The Administrator authority role ability provides this functionality without having this ability assigned.
<i>Project Controls</i>	
Project - Add	The <i>Project - Add</i> role ability provides access to the Project Creation functions of Timesheet.
Project - Delete	The <i>Project - Delete</i> role ability provides access to the Project Deletion functions of Timesheet.
Project - Modify	The <i>Project - Modify</i> role ability provides access to the Project Modification functions of Timesheet.
<i>Accountlink Access</i>	
QuickBooks Sync Admin	The <i>QuickBooks Sync Admin</i> role ability provides access to the Accountlink synchronization functions of Timesheet. Note: To use Accountlink synchronization, your organization <i>must</i> have purchased Accountlink for Timesheet.
<i>Reporting Access</i>	
Report Creation	The <i>Report Creation</i> role ability allows users to whose role contains this ability to create reports in Timesheet.
Report Modification	The <i>Report Modification</i> role ability allows users to whose role contains this ability to modify reports in Timesheet that they have access to through group membership or individual ownership.
<i>Memorized Sheets</i>	
Memorized Sheets - Create For Groups	The <i>Memorized Sheets - Create For Groups</i> role ability provides access to the Group Schedule Creation functions of Timesheet.
Memorized Sheets - Create For Others	The <i>Memorized Sheets - Create For Others</i> role ability allows a user whose role includes this ability to create schedules for other users within the Timesheet database.
Memorized Sheets - Create For Self	The <i>Memorized Sheets - Create For Self</i> role ability allows a user whose role contains this ability to create schedules for him- or herself.
<i>User Controls</i>	
User - Add	The <i>User - Add</i> role ability allows a user whose role includes this ability to create new users within the Timesheet database.
User - Delete	The <i>User - Delete</i> role ability allows a user whose role includes this ability to create delete users from the Timesheet database.

User - Modify	The <i>User - Modify</i> role ability allows a user whose role includes this ability to modify existing users within the Timesheet database.
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Below is a matrix of Roles and Authorities.

	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	QuickBooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Approvals Management											
Approver - Regular			X		X						
Approver - Super	X										
Role Authority	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Authority - Administrator	X			X			X				
Authority - Expensekeeper											
Authority - Manager			X		X						
Authority - Mileagekeeper											
Authority - Punch User						X					
Authority - Reporter								X			
Authority - Timekeeper	X									X	
Authority - User			X		X	X			X	X	X
Button Access	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Administration Access	X		X		X			X	X	X	X
Details Tab	X		X		X			X	X		X
Expenses Tab			X		X				X		X
Custom Link	X		X		X			X	X	X	X
Help Link	X		X		X			X	X	X	X
Logout Link	X		X		X	X		X	X	X	X
Mileage Tab			X		X				X		X
Reset Password Tab	X		X		X			X	X	X	X
Preferences Tab	X		X		X				X		X
Reports Tab	X		X		X			X	X	X	X
Time Tab			X		X				X	X	X
Prior Period Adjustments (Corrections)	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Corrections - Expense	X										
Corrections - Mileage	X										
Corrections - Time	X										
Conversions Table Maintenance	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User

Currency Conversion – Controller	X										
Mileage Conversion – Controller	X										
Disconnected Client Module Access	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
DC - Expense		X									
DC - Mileage		X									
DC - Project		X									
DC - Time		X									
Projectlink Access	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
MSPProject Sync Admin				X							
MSPProject Sync User				X							
Rate Reporting	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Modify Rate Report	X										
Run Rate Check Report	X										
Run Rate Report	X										
Project Controls	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Project - Add	X			X	X		X				
Project - Delete	X			X	X		X				
Project - Modify	X			X	X		X				
Accountlink Access	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
QuickBooks Sync Admin							X				
Reporting Access	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Report Creation	X		X		X	X		X	X	X	X
Report Modification	X		X		X	X		X	X	X	X
Password Controls	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Password Change	X		X	X	X		X				
Approvals Controls	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Sheet approval Management	X										
Memorized Sheets	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
Memorized Sheets - Create For Groups	X		X		X					X	

Memorized Sheets - Create For Others	X									X	
Memorized Sheets - Create For Self	X								X		
User Controls	Administrator	DC Access	Manager	MSPProject Admin	Project Manager	Punch User	Quickbooks Admin	Reporter	Memorized Sheet User	Timekeeper	User
User - Add	X			X			X				
User - Delete	X			X			X				
User - Modify	X		X	X	X	X	X	X	X	X	X

Custom Roles

In addition to the default roles shipped with the system, you may create Custom Roles that possess the right permutation of privileges for your business needs. Custom Roles can be created at the bottom of the main Roles Management screen (see figure 4.2).

Add A New Role

New Role Name	Description	Role Abilities (choose at least 1)	Auto Add Role to new Groups	Add Role to Groups	Give Role To Users	Remove Selected Users From Previous Roles?	Allow Role to View All Custom Fields?
<input type="text"/>	<input type="text"/>	<div>Access - Dashboard Access - Details Access - Entry Screens Access - Expense Entry Access - Extra Link</div>	<div>Yes</div>	<div>RM Group for 1, u RM Group for 2, u</div>	<div>1, u 2, u</div>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 4.2. Custom roles

To create a new Custom Role, specify a name and description, the role abilities, whether to add the role to any new Groups that are created, which users in which Groups to assign the Custom Role to, whether to remove the selected users' previous roles, and whether the role will be able to view all Custom Fields in reports. When finished, click the Create button.

To modify an existing Custom Role, make the changes on the main Roles Management screen and then click the Modify button (see figure 4.1).

To delete a Custom Role, select the Custom Role to delete from the main Roles Management screen and click the Delete button (see figure 4.1).

Search Fields

Search Management is located under Configuration→Search Fields (see figure 5.1).

Configuration → Search Fields

The Search Fields screen determines which options show up in search forms throughout the rest of the system.

Object	Available options:	Buttons	Options to appear in search form:
User	User Custom Field: Employee Type User Custom Field: User Bill Rate Type User Custom Field: User Pay Rate Type	Add → ← Remove	Project Group
Project	Project Custom Field: Priority Project Custom Field: Project Bill Rate Type Project Custom Field: Project Bill Type Project Custom Field: Project Pay Rate Type Project Custom Field: Project Type	Add → ← Remove	Group Status Project Parent
Entry Columns	Source Custom Field: Reimbursement Status Pay Type Custom Field: Allocation Exempt	Add → ← Remove	Group Status

Save Cancel

Figure 5.1. Search fields management

Search Fields allow you to specify which fields users can select as criteria when searching for the following objects: Users, Projects, Tasks, Pay Types, Bill Types, Expense Codes, Sources, Currencies, Reasons, Vehicles, and Measurements. You can allow different criteria to be specified when users search for different objects. For each of the system objects mentioned above, you can select from the list of available search options and place them in the assigned search options by clicking the Add button. To remove them, simply select the option in the right listbox and click the Remove button. You may also use the shift-click and ctrl-click functionality. When finished, click the Save button.

Periods

Period management is located under Configuration→Periods→Manage Periods.

Before users can begin logging time, expense, or mileage, the system administrator must first create and assign the Periods that the organization will be using. A Period may be thought of as the equivalent to a pay period. Although these do not necessarily have to coincide, administrators and users typically find it most intuitive if they use Periods that coincide with their pay periods. You may also want to create a monthly Period if you bill your clients every month or pay your employees at the end of the month. In essence, Periods will be assigned to

users' timesheets, expense sheets, and mileage sheets, which will force them to track their time, expense, and mileage within the chronological confines of how your organization wishes to keep track of their time and expenses.

The product ships with only one default Period – weekly (see figure 6.1). This Period covers seven days that run from Sunday through Saturday. If your organization needs to use different Periods, the system allows you to create any number of Periods to meet your unique business or billing needs.

Configuration → Periods → Manage Periods

Periods determine the date intervals for which users will enter and submit time, expenses and mileage. Periods must be assigned to users' sheets before taking effect

Select a Period to Delete

Select	Period Name	Period Description	Timesheets Using Period	Expensesheets Using Period	Mileagesheets Using Period
In Use	weekly	Weekly (Sunday through Saturday)	3	0	0

Delete Create Period

Figure 6.1. Periods main page

To create a new Period, click the Create Period button located in the lower right corner of the main Periods screen. This will direct you to the Period Creation screen (see figure 6.2). Specify a name for the new Period. Then specify a date range for the duration of the Period. The date ranges for which you can create a Period are weekly, bi-weekly, semi-monthly, monthly, or a date range.

Configuration → Periods → Create Period

Enter values in the fields below and click Save or Save and Assign Users.

Name:

Duration:

- ☒ Weekly

Start on
- ☐ Bi-Weekly

Starting on
- ☐ Semi-Monthly

First Period lasts from the first through the inclusive.
(Second Period is comprised of the remaining days.)
- ☐ Monthly

Period begins on the day of the month.
- ☐ Day-Range

Start on for days.

Save Save and Assign Users Cancel

Figure 6.2. Period creation

A weekly Period covers seven days from the day chosen as the start day.

A bi-weekly Period covers fourteen days from the day chosen as the start day. Please note that when defining a bi-weekly period, you must indicate both the day of the week and indicate whether the period begins this week or last week.

A semi-monthly Period divides a month into two time periods that are defined as the first of the month through the date you set and the day after the date you set through the end of the month.

A day-range Period covers a set number of days, beginning on the date you define.

When finished selecting the duration, you can save the Period by clicking the Save button. Alternatively, you can save the Period and assign users by clicking the Save and Assign Users button. Periods must be assigned to users' timesheets in order for users to be able to log time. To assign the Period to users' timesheets, you must first specify the search criteria for users that you want to assign the Period to (see figure 6.3). From the search results you can select the users to assign and click the Assign button. Alternatively, you can assign periods to users' sheets as you create them under User Management provided the Periods have already been created.

Configuration → Periods → Assign Time Periods

Select users and click on Assign to Users to assign the period to the selected users.

Search

User name contains

Project is anything
 root
 sp1
 sp1 task 1
 sp1 task 2

Group is anything
 All
 RM Group for 1, u
 RM Group for 2, u

Search

Search Results Showing 1 - 2 of 2 Users Results Per Page: 200 **Go**

Name	Login	Time Approval	Expense Approval	Mileage Approval	Most Current Timesheet Period
<input type="checkbox"/> 1, u	u1	Create New	Create New	Create New	07/18/2010 - 07/24/2010
<input type="checkbox"/> 2, u	u2	Create New	Create New	Create New	07/11/2010 - 07/17/2010

0 selected [Select All](#) Results Per Page: 200 **Go**

Select the time period to assign.

time period monthly

action

☒ Future only (if timesheets are compatible, assigns new period to future timesheets)

☐ Remove old (remove all time records for these users and start fresh with new period)
WARNING: this cannot be undone!

Assign To Users

Figure 6.3. Assigning Period to users' timesheets

To assign a Period to users' expense sheets, click the link labeled 'Expense Period Assignments' on the main Periods screen (see figure 6.1). This will direct you to the user search, user selection, and Period assignment screen (see figure 6.4). Once again, you must first specify the search criteria for users that you want to assign the Period to. From the search results you can select the users to assign, select the Period, and click the Assign to Users button.

Configuration → Periods → Assign Expense Periods

Select users and click on Assign to Users to assign the period to the selected users.

Search

User name contains

Project is anything
 root
 sp1
 sp1 task 1
 sp1 task 2

Group is anything
 All
 RM Group for 1, u
 RM Group for 2, u

Search

Search Results Showing 1 - 2 of 2 Users Results Per Page: 200 **Go**

Name	Login	Time Approval	Expense Approval	Mileage Approval	Most Current Expensesheet Period
<input type="checkbox"/> 1, u	u1	Create New	Create New	Create New	none
<input type="checkbox"/> 2, u	u2	Create New	Create New	Create New	none

0 selected [Select All](#) Results Per Page: 200 **Go**

Select the expense period to assign.

time period action

☐ Future only (if expensesheets are compatible, assigns new period to future timesheets)

☒ Remove old (remove all expense records for these users and start fresh with new period)
WARNING: this cannot be undone!

Assign To Users

Figure 6.4. Assigning Period to users' expense sheets

Assigning a Period to user's mileage sheets is accomplished similarly by clicking the link labeled 'Mileage Period Assignments' on the main Periods screen (see figure 6.1). This will direct you to the user search, user selection, and Period assignment screen (see figure 6.5). Once again, you must first specify the search criteria for users that you want to assign the Period to. From the search results you can select the users to assign, select the Period, and click the Assign to Users button.

Configuration → Periods → Assign Mileage Periods

Select users and click on Assign to Users to assign the period to the selected users.

Search

User name contains

Project Group

Project: is anything, root, sp1, sp1 task 1, sp1 task 2

Group: is anything, All, RM Group for 1, u, RM Group for 2, u

[Search](#)

Search Results Showing 1 - 2 of 2 Users Results Per Page: 200 [Go](#)

Name	Login	Time Approval	Expense Approval	Mileage Approval	Most Current Mileagesheet Period
<input type="checkbox"/> 1, u	u1	Create New	Create New	Create New	none
<input type="checkbox"/> 2, u	u2	Create New	Create New	Create New	none

0 selected [Select All](#) Results Per Page: 200 [Go](#)

Select the mileage period to assign.

time period action

monthly

☒ Future only (if mileagesheets are compatible, assigns new period to future timesheets)

☐ Remove old (remove all mileage records for these users and start fresh with new period)

WARNING: this cannot be undone!

[Assign To Users](#)

Figure 6.5. Assigning Period to users' mileage sheets

Note: Extra caution should be exercised when changing the Period assignment for a user who has already entered records. If you select the future only option for the new Period assignment, you may be required to set up a 'transition period' if the old period doesn't end the day before the new period is set to begin. If you select the remove old sheets option, all past records for the user will be permanently deleted from the database. Journyx strongly recommends backing up your database before selecting to remove old sheets for a new period assignment.

To delete an existing Period, select the Period from the Period Management screen and click the Delete button (see figure 6.1). If the Time Period is assigned to any users, you will not have the option to select the Period for deletion.

Conversions

Currency Conversions

Currency Conversions is located under Configuration→Conversions→Currency Conversions (see figure 7.1).

Configuration → Conversions → Currency Conversions

To create a Currency conversion, specify the to and from currencies, conversion rate, and date range that the conversion will be effective.

Search Past Conversion Rates to view history or make adjustments:

From currency

Any

To currency

Any

Search

Current Conversion Rates:

Convert from Currency	Conversion Rate	To Currency	Effective Start	Effective End	Close Rate
<input type="checkbox"/> US\$ =	1.25 of	AU\$	01/01/2010	current	Close Rate
<input type="checkbox"/> US\$ =	.75 of	EUR	01/01/2010	current	Close Rate
<input type="checkbox"/> US\$ =	1.5 of	RUB	01/01/2010	current	Close Rate

Edit

Save

Delete

Create Conversion

Figure 7.1. Currency conversions main page

Before users begin tracking expenses, the system administrator should configure actual currency rates if you will be tracking expenses in multiple currencies. Expense reporting is dependent upon the existence of currency rate conversions when multiple currencies are present in a single report. These conversions are used to convert expense amounts from various currencies to a base currency for the purpose of easier expense reporting and tracking.

The system ships with nine default currencies:

- AU\$ Australian Dollar
- CA\$ Canadian Dollar
- CHF Swiss Franc
- EUR Euro
- GBP British Pound
- JPY Japanese Yen
- MXN Mexican Peso

RUB Russian Ruble

US\$ U.S. Dollar

Currency Rates

Currency rates are positive numerical values that reflect the exchange rate between the two currencies selected. If the US Dollar is worth 177.55 Japanese Yen, the rate for this currency conversion would be '177.55' where 1 US Dollar is equivalent to 177.55 Japanese Yen.

Effective Start Date

This date determines the point at which a currency conversion becomes effective. Expense entries before this date will use the previous conversion rate.

State/Effective End Date

The state determines whether or not the conversion has a specified end date. For closed conversions, the end date determines the point at which this currency conversion expires. Expense entries after this date will use a later conversion rate. Open conversions, on the other hand, will not expire until they are manually closed. An open conversion will be applied to future expense records that appear in reports unless it is closed and another conversion to cover the period is created.

To create a new currency conversion, click the Create Conversion button in the lower right corner of the main Currency Conversions screen (see figure 7.1). Up to three currency conversion rates may be created at one time (see figure 7.2).

Configuration → Conversions → Currency Conversions

To create a Currency conversion, specify the to and from currencies, conversion rate, and date range that the conversion will be effective.

Create new conversion rates.

Convert from Currency	Conversion Rate	To Currency	Effective Start	State (Effective End)
AU\$ =		AU\$	07/21/2010	Open
AU\$ =		AU\$	07/21/2010	Open
AU\$ =		AU\$	07/21/2010	Open

Create RatesCancel

Figure 7.2. Create currency conversion rates

To create a new conversion rate, select the two currencies for conversion and then specify the conversion rate. Enter the effective start date for this currency conversion rate. You may enter the effective start date manually. If this field is left blank, the system will set today's date as the default effective start date. Enter the effective end date for this currency conversion rate. You may enter the effective end date manually. If this field is left blank,

the system will assume the effective end date to be open and this conversion rate will remain in effect until it is manually closed. When finished, click the Save button.

Past Conversion Rates

The top portion of the main Currency Conversions screen provides an interface that allows you to search for historical currency conversion rates (see figure 7.1). These searches are based upon currency pairs and will return the historical conversions between a single currency pair. So for example, if you wanted to view the historical conversion rates between the US dollar and the Japanese yen, then you would select the US dollar and the Japanese yen. To search for previous conversion rates, select the two currencies to search for. When finished, click the Search button. The search results will display a history for the requested conversions.

Each unique combination of two currencies can have only one active rate for any time period. You cannot have two concurrent currency conversion rates for the same currencies.

The Close Rate Link

Located under the Close Rate header, this link expires a particular conversion rate by setting its Effective End Date to the current day.

To modify an existing conversion rate, specify a new conversion rate and click the Save button (see figure 7.1).

To delete a conversion, select the conversions and click the Delete button (see figure 7.1).

Mileage Conversions

Mileage Conversions is located under Configuration→Conversions→Mileage Conversions (see figure 7.3).

Configuration → Conversions → Mileage Conversions

To convert travel distance to Currency, specify the distance unit of Measurement , conversion rate, Currency, and date range that the conversion will be effective.

Search Past Conversion Rates to view history or make adjustments:

Any

Any

Search

Current Conversion Rates:

Edit	Measurement	Conversion Rate	Currency	Effective Start	Effective End	Close Rate
<input type="checkbox"/>	mi =	.45	US\$	01/01/2010	current	Close Rate
<input type="checkbox"/>	km =	.33	US\$	01/01/2010	current	Close Rate

Edit

Save

Delete

Create Conversion

Figure 7.3. Mileage conversions main page

Before users begin tracking mileage, the system administrator should configure the mileage conversions to reflect actual mileage rates. Mileage reporting is dependent upon the existence of mileage rate conversions. These conversions are used to convert entered miles into expenses that can be included in expense reports by the system reporting engine. Each of these mileage rate conversions consists of a unit of distance measurement and a currency.

The system ships with the following two default units of measurement. If your organization uses a different unit of measurement for travel expenses, you may create a new unit under Management→Field Values.

the Mile (m)

the Kilometer (km)

The system ships with the following default currencies.

AU\$ Australian Dollar

CA\$ Canadian Dollar

CHF Swiss Franc

EUR Euro

GBP British Pound

JPY Japanese Yen

MXN Mexican Peso

RUB Russian Ruble

US\$ U.S. Dollar

Mileage rates are positive numerical values that reflect the cost per measurement unit in the currency selected. So if your organization expenses miles at \$1.27 per mile, the rate for that rate conversion would be '1.27' where the unit of measurement would be 'mile' and the currency would be 'US\$'.

Effective Start Date

This date determines the point at which the mileage conversion becomes effective. Mileage entries before this date will use the previous conversion rate.

State/Effective End Date

The state determines whether or not the conversion has a specified end date. For closed conversions, the end date determines the point at which this mileage conversion expires. Mileage entries after this date will use a later conversion rate. Open conversions, on the other hand, will not expire until they are manually closed. An open conversion will be applied to future mileage records that appear in reports unless it is closed and another conversion to cover the period is created.

To create a new mileage conversion, click the Create Conversion button in the lower right corner of the main Mileage Conversions screen (see figure 7.3). Up to three mileage conversion rates may be created at one time (see figure 7.4).

Configuration → Conversions → Mileage Conversions

To convert travel distance to Currency, specify the distance unit of Measurement , conversion rate, Currency, and date range that the conversion will be effective.

Create new conversion rates.

Measurement	Rate	Currency	Effective Start	State (Effective End)
km =		AU\$	07/21/2010	Open
km =		AU\$	07/21/2010	Open
km =		AU\$	07/21/2010	Open

Create RatesCancel

Figure 7.4. Create mileage conversion rates

To create a new conversion rate, select the unit of measurement for the new conversion rate. The available units of measurement appear in the dropdown menu located under the Measurement column. Enter the numerical value for this rate. Remember, this rate will determine the amount of the selected currency that will be charged for each unit of measurement traveled. Select the currency to be used by this new conversion rate. The available currencies appear in the dropdown menu located under the Currency column. Enter the effective start date for this mileage conversion rate. You may enter the effective start date manually. If this field is left blank, the system will set today's date as the default effective start date. Enter the effective end date for this conversion rate. You may enter the effective end date manually. If this field is left blank, the system will assume the effective end date to be open and this conversion rate will remain in effect until it is manually closed. When finished, click the Save button.

Past Conversion Rates

The top portion of the main Mileage Conversions screen provides an interface that allows you to search for historical mileage conversion rates (see figure 7.3). These searches are based upon a measurement-currency pair and will return historical conversions for only one particular pair. To search for previous conversion rates, select a measurement and currency. When finished, click the Search button. The search results will display a history of the requested conversions.

Each unique combination of measurement and currency can have only one active rate at any time, although you can have two concurrent rates for miles if one is for US\$ and one is for EUR. However, you cannot have two concurrent rates for miles if both are for the same currency.

The Close Rate Link

Located under the Close Rate header, this link expires a particular mileage conversion rate by setting the effective end date to the current day.

To modify a conversion rate, specify a new value and click the Modify button (see figure 7.3).

To delete a conversion, select the conversions and click the Delete button (see figure 7.3).

Holiday Schedules

Holiday Management

Holiday Management is located under Configuration→Holiday Schedules→Manage Holidays (see figure 9.2.1). Schedules that may include different lists of holidays are created under Holiday Schedules. Individual holiday entries with a designated schedule(s) and hours details are created under Holiday Management. Holiday Schedules can then be assigned to users via Groups.

[Configuration](#) → [Holiday Schedules](#) → [Manage Holidays](#)

Holiday Management allows you to create and associate specific holidays with Holiday Schedules defined in the system. Holiday Schedules are sets of holidays that can be assigned to users via the Groups feature. Click on the Holiday Schedules link to create additional sets of holidays.

Search

Holiday name:

Holiday Date:

Holiday Schedule:

Project:

Search

Search Results Showing 1 - 2 of 2 Holidays Results Per Page: **Go**

Date	Name	Holiday Schedule	Project	Activity	Pay Type	Bill Type
<input type="checkbox"/> 11/25/2010	Thanksgiving	US Holidays	root	Other	Holiday	Standard
<input type="checkbox"/> 09/06/2010	Labor Day	US Holidays	root	Other	Holiday	Standard

0 selected [Select All](#) Results Per Page: **Go**

Delete **Create**

Figure 9.2.1. Holiday Management main page

To create a new holiday, click the Create button in the lower right corner of the screen. This will direct you to the Holiday Creation screen where you can specify the date, schedule, hours, name and other time entry details (see figure 9.2.2).

[Configuration](#) → [Holiday Schedules](#) → [Manage Holidays](#) → [Create](#)

Holiday Management allows you to create and associate specific holidays with Holiday Schedules defined in the system. Holiday Schedules are sets of holidays that can be assigned to users via the Groups feature. Click on the Holiday Schedules link to create additional sets of holidays.

Entry Row

Holiday Date:

Holiday Schedule:

Hours:

Holiday Name:

Project:

Activity:

Pay Type:

Bill Type:

Save **Save and New** **Cancel**

Figure 9.2.2. Holiday Creation

The Holiday Schedule field will determine which schedule(s) the new holiday will be added to. The Holiday Name field will populate the Comment (or renamed text) field on the users' Time Entry screens. Time Entry columns on this screen will respect Project Dependencies if any exist; however, there is no filtering of the selection lists for Group accessibility because any given holiday can be assigned to more than one Group. When finished selecting the new holiday details, click the Save button or the Save and New button if creating more than one holiday entry.

To delete a holiday, select the entry to delete from the search results and click the Delete button (see figure 9.2.1).

When assigned to a user's Group, holiday entries are loaded in the Time Entry screen when the user first views the period. While the entry is not in an approved state, it will continue to be reloaded if the user changes the hours or details of the entry. As a result, a user cannot remove a holiday entry assigned via Groups.

Holiday Management

Holiday Types is located under Configuration→Holiday Schedules→Manage Holiday Schedules (see figure 9.2.3). Holiday Schedules contain lists of holidays that can be assigned to Groups for automatic loading of holidays in users' Time Entry screens.

Configuration → Holiday Schedules → Manage Holiday Schedules

Holiday Schedule Management allows you to create schedules that can have different sets of holidays associated with them. The schedules are then assigned to users via the Groups feature. Holiday Schedules cannot be deleted if there are any holidays associated with them.

Holiday Schedule Name:

Save

Holiday Schedule

<input type="checkbox"/>	EU Holidays
<input type="checkbox"/>	US Holidays

Delete

Figure 9.2.3. Holiday Schedules main page

To create a new Holiday Schedule, enter a name in the text box at the top of the page and click on the Save button. The new Schedule will appear in the Holiday Schedule list below and the Holiday Schedule select list on the Holiday Creation page. There is a limit of 15 Holiday Schedules per Timesheet installation.

To modify the name of an existing Holiday Schedule, click on the name of the Holiday Schedule to modify.

To delete a Holiday Schedule, select the Holiday Schedule to delete and click the Delete button.

Management

User Management

User Management is located under Management→Users→Manage Users (see figure 10.1). The User Management section allows you to modify a user's profile, roles, assigned groups, entry screens, default memorized sheets, approval plans, period assignments, policy assignments, and custom fields.

Management → Users → Manage Users

Specify the search criteria for users that you would like to manage. Click the name to modify the user's full set of attributes. To create several users at once, see the [User Import Tools](#) under Configuration → System Settings → Imports.

Search

User name: contains [] Role: User

Status: Active, Inactive, Hidden

Project: is anything, root, sp1, sp1 task 1, sp1 task 2

Group: is anything, All, RM Group for 1, u, RM Group for 2, u

Search

Search Results Showing 1 - 2 of 2 Users Results Per Page: 200 Go

Name	Login	Time Entry	Expense Entry	Mileage Entry	Time Approval	Expense Approval	Mileage Approval
<input type="checkbox"/> 1. u	u1	Standard Time Entry Grid	Standard Expense Entry Grid	Standard Mileage Entry Grid	Create New	Create New	Create New
<input type="checkbox"/> 2. u	u2	Standard Time Entry Grid	Standard Expense Entry Grid	Standard Mileage Entry Grid	Create New	Create New	Create New

0 selected [Select All](#) Results Per Page: 200 Go

Compare and Modify Delete Deactivate Activate Create User

Figure 10.1. User search and selection

To manage a user, you must first specify search criteria for the users that you want to view and modify. After specifying the search criteria, click the Search button. This will display the search results below, from which you can select the user to modify by clicking the name. You will be taken to the user modification screen where you will be able to modify the above mentioned user attributes (see figure 10.2). From the search results page, you may also select users that you would like to Activate or Deactivate by selecting the users and clicking the respective button (see figure 10.1).

By default, the search results on the User Management screen show all Active users. User status is defined by the values in the Employee Start and End Date fields within the Custom Fields in each user's profile. Active users have a start date that is or precedes the current day and a blank or future end date. Any users who have future start dates or expired end dates will show up in search results for inactive users.

When a new user is created, the Employee Start Date is automatically set to the current day. However, this field can be changed to reflect any date. This date not only determines when the user will become active and thus have access to the Timesheet system, but it also determines on what days the user can enter time, expense, or mileage records. If the employee becomes active in the middle of a period, he/she will only be able to enter records from the start date going forward. Likewise, a user cannot enter records after the Employee End Date.

Users can be deactivated by either selecting them from the search results and clicking the Deactivate button or adding a value to the End Date field within the user's profile. If you deactivate a user by clicking on the button, the End Date field is automatically populated with the date of the previous day. Inactive users retain their user profiles and configuration, but they are no longer able to access the Timesheet system, and no one can enter records for them outside of their active dates. Inactive users continue to appear in Standard Reports. Inactive users do not receive approval email notifications, and approvers will only receive notices for inactive users that apply to periods when they were active.

It is also possible to activate inactive users. This can be done by either selecting them from the search results and clicking the Activate button or updating the Start Date and End Date fields within the user's profile. Reactivated users retain their original configuration, so no other steps are necessary to grant them access to the appropriate information in the Timesheet system. When a user is reactivated, the Start Date and End Date fields are reset to the current values. Previous start and end date values are NOT retained.

Copy the settings of User: 1, u

Load

Username:

New password:

Full name:

Confirm password:

☐ Hide this user

Roles:

User
Time User
Timekeeper
Scheduled Project Management
Reporter
Punch User

Groups:

All
RM Group for 1, u
RM Group for 2, u

Entry Screens

Time entry screen:

Standard Time Entry Grid

Default comment:

Default Comments

Expense entry screen:

Standard Expense Entry Grid

Number of blank entries:

3

Mileage entry screen:

Standard Mileage Entry Grid

Maximum number of items in selection drop downs:

200

Approval Plans

Time approval plan:

Select an Approval Plan

Expense approval plan:

Select an Approval Plan

Mileage approval plan:

Select an Approval Plan

Period Assignments

Time period:

Select a time period

Expense period:

Select a time period

Mileage period:

Select a time period

Policy Assignment

Policy

-No Policy-

Custom Fields

Email Address:

Mobile File ID:

Figure10.2. User management screen

User Profile and Privileges

The User Profile and Privileges section contains the username, full name, password, roles that the user has been assigned to, and groups that the user has been assigned to (see figure 10.2).

The username cannot contain the following special characters:

!	"	#	\$	%	'	*	+	,	/	¿
:	;	<	>	=	?	@	[]	\	^
`	{	}		~	i	¢	£	¤	¥	¡
§	¨	©	ª	«	¬	SHY	®	—	°	±
²	³	´	µ	¶	·	,	¹	º	»	¼
½	¾	(space)	 (non-breaking space)							

If you do not specify a password for a new user, his/her password will be the same as the username. A user may also be switched from Active to Hidden status. If a user is hidden, he/she will not be able to login to the system for tracking or reporting purposes. In addition, his/her previous records will only be available in reports run by users with Administrator authority. Hiding users removes them from their Group memberships. As a result, managers cannot report on hidden users’ data. A user should only be hidden in the event that his/her records are no longer needed for reporting purposes. If the user data is still required or the user might need access to the system again in the future, the user should be deactivated as described in the previous section.

Roles define the privileges that the user will have. For more information on roles, see the Roles section of this manual. You can select multiple roles by using the ctrl-click or shift-click functionality.

Groups define the field values that the user will have access to such as specific projects, tasks, expense codes, etc. You can select multiple groups by using the ctrl-click or shift-click functionality. For more information on groups, see the Groups section of this manual.

Entry Screens

In the Entry Screens section, you can select the type of time entry screen, expense entry screen, and mileage entry screen that the user will utilize when logging time, expenses, and mileage (see figure 10.2). You can further specify a default comment and default number of blank entries to display for that user's timesheets, expense sheets, and mileage sheets. Keep in mind that users will still be able to override these default values from their Preferences section. The last field in this section allows you to set the maximum number of items to display in selection dropdown menus on entry screens. This setting determines at what point a dropdown selection menu is switched out for search only selection. This value will only take effect if it is less than the value in the global preference for this field. For more information on this setting, please see the Entry Sheets section under System Settings in this manual.

Memorized Sheets

This option allows you to assign or change the default memorized sheet for a user (see figure 10.2). You can create memorized sheets under Management→Memorized Sheets.

Approval Plans

In the Approval Plans section, you can select the approval plans for the user's timesheets, expense sheets, and mileage sheets (see figure 10.2). The system further allows you to make modifications to the assigned approval plans. Modifying the approval plans from the User Management screen will not affect the other users that have been assigned the same approval plan. Please note that if you make modifications to the individual user's approval plan, the user's association with the original approval plan will be removed. You should only make modifications to a user's approval plan via the link on this page if you want the user to have a plan that is completely unique to him/her. To modify the approval plans for the selected user only, click the respective link next to the selected approval plan labeled 'Modify Approval Plan for this user'. This will take you to the Approval Plan management screen where you will be able to select the primary and backup approvers, as well as make modifications to the approval plan email settings. For more information about approval plans, see the Approval Plans section of this manual. If you are using Organization Chart Manager to create your approval plans, you will not assign a time approval plan on this screen.

Period Assignments

In the Period Assignments section, you can assign the period for the user's timesheets, expense sheets, and mileage sheets (see figure 10.2). If the user was already assigned a period for a sheet and you would like to assign a different period, simply select the new period from the respective dropdown. You also have the option to delete any sheets that used the previous period by checking the checkbox labeled 'Remove old sheets'. Please keep in mind that this will delete from the system all of the user's sheets, and the records associated with these sheets, that utilized the old period, and you will be unable to retrieve them afterwards. For more information about Periods, see the Periods section of this manual.

Policy Assignment

This option allows you to assign an existing policy to the user (see figure 10.2). You can create policies under Configuration→Policies→Rule & Policy Management.

Custom Fields

In the Custom Fields section, you have the ability to specify values for the available custom fields (see figure 10.2). For more information about custom fields, please see the Custom Fields section of this manual. When finished making modifications, you can simply click the Save button.

Creating a User

To create a new user, click the Create User button located in the lower right corner of the main User Management page containing the search criteria and results (see figure 10.1). This will take you to the User Creation screen where you can select and specify all the necessary user attributes (see figure 10.2).

On the User Creation screen, you also have the ability to copy the attributes of another user by searching and selecting a user and then clicking the Load button located at the top right corner (see figure 10.3).

This will prepopulate that user's attributes which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new user. When finished selecting and specifying attributes for the new user, you can simply click the Save button. Alternatively, if you want to save this user and create another user, you can click the Save and New button.

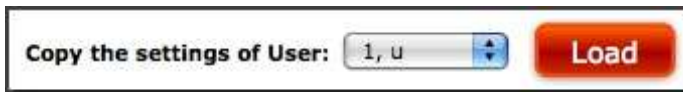


Figure 10.3. Copy another user

Deleting a User

To delete users, simply check the users to delete from the search results and click the Delete button (see figure 10.1). You will not be able to delete any users with time, expense, or mileage records in the system. If you wish to delete a user with records, you must first delete all the records for the user.

Timekeeping, Expense Keeping, Mileage Keeping

Users of the system who have been given the Timekeeper Role will have the ability to create time records for other users, which is also known as Timekeeping. Similarly, users who have been given the Expense Keeping Role or Mileage Keeping Role will have the ability to create and edit expense and mileage records for other users, respectively.

Timekeeping functionality is located under Management→Users→Timekeeping (see figure 15.1). Here you will be able to manage other users' time, expenses, and mileage, if given that Role. You must first search for the users that you would like to manage. Specify the search criteria for the users and click the Search button. The search results will be displayed below the criteria.

Management → Users → Timekeeping

Specify the search criteria, including a date, for the period and users you would like to manage. Click on the period dates to modify a user's sheet. Select sheets using the checkboxes to submit sheets for approval.

Sheet Date: 04/12/2013

Search:

User name: contains user

Status: Active, Inactive, Hidden

Group: is anything, All, RM Group for 1, User, RM Group for 2, User, RM Group for 4, User

Project: is anything, root, ap3: task 1 with a really long name to test wrapping, xxxxxx, UDS: Task 1

Search

Search Results Showing 1 - 4 of 4 Users Results Per Page: 200

Select	T	Name	Login	Timesheet	Expense Sheet	Mileage Sheet	Email Address	Employee Number	Phone Number
<input type="checkbox"/>	<input type="checkbox"/>	1, User	u1	04/07/2013 - 04/12/2013	create	create	Not Available	Not Available	Not Available
<input type="checkbox"/>	<input type="checkbox"/>	2, User	u2	create	create	create	Not Available	Not Available	Not Available
<input type="checkbox"/>	<input type="checkbox"/>	3, User	u3	create	create	create	Not Available	Not Available	Not Available
<input type="checkbox"/>	<input type="checkbox"/>	4, User	u4	create	create	create	Not Available	Not Available	Not Available

0 selected Select All Results Per Page: 200

Master Timekeeper Master Expensekeeper Master Mileagekeeper Submit Sheets

Figure 15.1. Timekeeping, Expense Keeping, and Mileage Keeping

The main timekeeping screen provides links to each individual's time, expense or mileage entry screen. However, you also have the option to track time, expenses or mileage for several users in a single entry screen. The Master Timekeeper screen allows the timekeeper to create, edit and delete entries for multiple users at once. The same functionality is available for expense and mileage keeping as well. Access to the master entry screens is provided by the buttons on the main Timekeeping screen below the user search results. The checkboxes under the Select heading allow you choose which users you want to see on the master entry screen. If you do not select any users before you click on a master keeping button, you will see all users in the user select list on that screen.

The main difference between an individual user's entry screen and a master entry screen is the inclusion of a user select list that allows you to choose the person for whom you are adding time, expenses or mileage. After you have added an entry for a user, you will also see all that user's entry details (e.g., existing entries, memorized entries, accrual balances). Keep in mind that it is easiest to select a group of users with common time periods and sheet configurations. If you select users who are assigned to different time periods, you will see an entry screen that spans both periods. The columns and column names shown on master entry screens are based on the sheet assigned to the timekeeper - not the individual users. Master Timekeeper is only supported for grid-based hours entry. Line item and allocation entry are not supported at this time.

From the search results, you have the option to submit several timesheets for approval at once by selecting the appropriate checkboxes under the column labeled 'T' and clicking the Submit Sheets button. Checkboxes will only appear in the 'T' column if that user has been assigned to an Approval Plan and the timesheet is eligible for submission (i.e., it hasn't already been submitted or approved). Similarly, expense sheets and mileage sheets can be submitted for approval by selecting the appropriate checkboxes under the columns labeled 'E' and 'M', respectively, and clicking the Submit Sheets button. You may also select a combination of users' timesheets, expense sheets, and mileage sheets before clicking the Submit Sheets button.

To modify a user's timesheet, simply click the timesheet period under the Timesheet column. This will prompt a pop-up window displaying that user's timesheet for that period. Here you can make the appropriate time entry modifications. For more information on managing timesheets, please see the Time Entry section of this manual. Having the Timekeeper role allows you to view the timesheet from a Timekeeper's View, as well as from the User's View. Timekeepers can toggle between the views by clicking the User View button and Timekeeper View button. The user will not see buttons that are available to Timekeepers only. Similarly, from the main Timekeeping page, you can choose to manage a user's expense sheet and mileage sheet.

Disconnected Users

Disconnected Users can be managed under Management→Users→Disconnected Users. The Disconnected User feature allows Managers to request time, expense, and mileage entry forms for users who have limited internet access. Users with the DC Access role can also request forms for themselves while logged into the system. Additionally, users whose roles allow them to create projects may also create projects using the Disconnected User forms.

The ability to use Timesheet while not directly connected to the Timesheet server is provided by the Disconnected User Module. The setup and use of this module is discussed fully in this section. Certain settings must be configured on the server side before this module can be implemented. These configurations will be covered first. This document will then describe the Disconnected User functionality from the user's perspective, discussing the procedures for using the Disconnected Client Module to create projects and track time, expenses, and mileage.

Disconnected User System Settings

You can configure Disconnected User settings under Configuration→System Settings→Disconnected Users. For more information on configuring these settings, see the Disconnected User section under System Settings of this manual.

User Settings

For the Disconnected Client module to function properly, each user who is expected to have access to Disconnected User features must meet three requirements:

- 1) The mail client used by each of the user must be configured to handle HTML attachments via a web browser.
- 2) Users must have an email address configured in the Custom Fields section located under Management→Users→User Management. For more information about Custom Fields, see the User Management and Custom Fields section of this manual.
- 3) Users must be assigned the Role of DC Access in addition to their default Role (i.e., User) in the system.

Managing Disconnected Users

Disconnected User management is located under Management→Users→Disconnected Users. The Disconnected User Module uses emailed HTML forms to provide users the ability to track time, expenses, and mileage while not connected to the system server. Additionally, users whose roles allow them to create projects are also able to create projects while disconnected through the use of forms specifically designed for project creation. This section will discuss the process of requesting, working with, and submitting the Disconnected User forms for each of the four possible disconnected functions.

On the main Disconnected User screen, you can view the users that have been assigned a Disconnected User Role (see figure 16.1). You can also see the next period start date of their sheets, email addresses, whether the email has been validated by the system, and whether automatic request has been set for each user. Each user's period is determined from his/her current or default timesheet whether they actually use the timesheet or not. The automatic mailing feature requests forms at the beginning of the user's sheet period. You also have the option to request forms from users by checking the 'Send Forms Now' checkbox for the respective users and clicking the Make These Changes button.

Management → Users → **Disconnected Users**

The Disconnected User module provides users with an interface for entering time, expenses, and mileage offline when internet access is limited. In order to request forms for offline entry, users must be assigned the DC Access role in User Management.

Administrator email addresses: [meredith <meredith@journyx.com>]

These addresses will be mailed in the event of a problem with the Disconnected User automatic mailings.

Users with Disconnected abilities

User	Disconnected Roles	Period Length (in days)	Next Period Start	Email Address	Email Validates? *	Automatically Mail Forms	Send Forms Now
2, u Form Management Page	DC Access	7	Sunday, July 25, 2010	meredith@journyx.com	YES	No <input type="button" value="v"/>	<input type="checkbox"/>
1, u Form Management Page	DC Access	7	Sunday, July 25, 2010	meredith@journyx.com	YES	No <input type="button" value="v"/>	<input type="checkbox"/>

* Email Validator is **not enforced**

Make These Changes

You currently have **2** users with a Disconnected User role. Your license key permits at most **Unrestricted** Disconnected Users. You have unlimited Disconnected Users in your license.

Note: to give users Disconnected User capabilities, you must go to the [User Management](#) screen and give them a Role that has Disconnected User abilities. By default, the system ships with 1 role (*DC Access*) that has all 4 Disconnected abilities (time, expense, mileage, and projects.)

This screen lets you modify Disconnected User settings for users who already have a Disconnected User-enabled Role. You can toggle the automatic mailing of Disconnected User forms at the beginning of a user's (timesheet) period, and you can force the system to send forms to a user right now rather than waiting for the next time period to begin. The user's 'time period' is determined from their current or default *timesheet* whether they actually use Time Entry or not.

If a user has 'Automatically Mail Forms' set to 'Yes', they will receive forms for **all** of the Disconnected User abilities their role gives them. If you need to fine-tune which forms Disconnected Users are automatically mailed, create a new role with just the Disconnected User abilities you want them to have. Then assign the user the new role (and take away the *DC Access* role.) If the user has a Disconnected User ability in their Roles, but Automail is set to 'No' here, the user can still manually request Disconnected forms through the **Disconnected User** link at the top right side of the screen.

Email Address validation is set in [System Settings \(Disconnected User\)](#). The email address validator is currently **Off**. If the validator is on, and a user's email setting does not pass the validator, the system will not send email to the user. The validator makes sure the address is an internet email address with a full domain.

Figure 16.1. Disconnected User main screen

Clicking any of the Form Management Page links displayed under the username of the Disconnected Users will direct you to the Disconnected User Form Management screen displaying all the outstanding form requests that have been made to the Disconnected User along with the details of each request such as request date, outstanding forms, last modified, expiration date, etc. (see figure 16.2). This is the same page the disconnected users see if they request their own forms. The last column in each row may be used to retire the batch of forms in that row. When a batch is retired, the system will not accept any further emails from that batch. A batch of forms that has been retired will still be displayed under Outstanding Disconnected User Requests until the system automatically expires old batches. The exact length of time until the system expires old requests is one of the Disconnected User Advanced preferences. The default is 28 days after the last period in the request ends. At that time all requests will be deleted from the system and no record of the request will be kept. Of course, any actual data submitted by the user from the forms before the expiration time will be kept permanently. To retire a batch of Disconnected User forms, select the batches to retire and click Retire These DC Requests button at the bottom of this section.

Management → Users → Disconnected Users → Disconnected User Form Management

The Disconnected User module provides users with an interface for entering time, expenses, and mileage offline when internet access is limited. In order to request forms for offline entry, users must be assigned the DC Access role in User Management.

Outstanding Disconnected User Requests for 1, u

ID	Date Range	Requested	Outstanding Forms	Active?	Received Replies?	Projects Accepted?	Time/Expense Accepted?	Rejected (Errors?)	Last Modified	Expires	Retire Request?
1ECDB1	07/18/2010 to 07/24/2010	07/21/2010 16:35:45	1	Yes	0	N/A	0	No	07/21/2010 16:35:46	08/21/2010 00:00:00	<input type="checkbox"/>

Retire these Disconnected User requests

Choosing Disconnected User Forms for 1, u

Please Select Forms and Time Periods:

Select All	Timesheet	Expenses	Mileage	Period
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, July 18, 2010 to Saturday, July 24, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, July 25, 2010 to Saturday, July 31, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, August 1, 2010 to Saturday, August 7, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, August 8, 2010 to Saturday, August 14, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, August 15, 2010 to Saturday, August 21, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, August 22, 2010 to Saturday, August 28, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, August 29, 2010 to Saturday, September 4, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sunday, September 5, 2010 to Saturday, September 11, 2010

Send your email to:

Request Forms

Figure 16.2. Disconnected User Form Management screen

The bottom portion of the Disconnected User Form Management screen allows you to request Disconnected User forms for time, expense, and mileage entry as well as the offline project creation form for different periods. Additionally, this section allows you to specify a different email address for the user when requesting forms. Entering an email address is only required if the email address is different from the one that is assigned to the user in Custom Fields. Select the timesheets, expense sheets, and mileage sheets to request for the user for the given periods. The available periods are the ones that have been created by the system administrator. If the user has been given the ability to create projects, you may also opt to request the offline project creation form. When finished, click the Request Forms button. The system will display a page confirming the details of the request such as email address of user, batch number, sheet and period, and total attachments, and successful transmittal of the email.

Disconnected User Experience

Forms are sent to Disconnected Users as attachments in a single email message. The forms themselves are HTML files that simulate actual Timesheet pages. Each form's data is stored in a unique cookie that is saved on the computer to which they are sent. Once the email

containing the offline forms has been received, the user can open each form in the web browser of his choice and begin to enter data. While it is perfectly acceptable to launch the forms directly from an email client, Journyx recommends saving each form attachment to the hard drive and working with the forms locally. This process prevents possible data loss due to unanticipated loss of email or interruption of connectivity. Furthermore, if your organization uses the IMAP mail protocol, saving the email locally guarantees that the attachments will be available offline as well.

Disconnected User Time Entry

The Disconnected User Time Entry Form is quite similar to the standard online Time Entry Screen. It uses the assigned time period and will display only those Projects, Tasks, Pay Types, and Bill Types that the user is allowed to see based upon Group membership. The process of entering time into the form follows standard time entry procedures exactly.

Once time entries have been entered, the user should simply click the Save Work In Progress button at the bottom of this form. Clicking this button saves all time entries and stores them locally in a cookie that will continue to hold this form's data until the form is submitted. The user does not need to be connected to the internet to save time entries.

Once all time entries have been completed for the period and the user is certain that no changes will need to be made, the user should connect to the internet and click the Email Completed Timesheet button at the bottom of the form. This will submit the form to the system.

If a user attempts to resubmit an offline time form that has already been submitted, a pop-up window will be displayed reminding the user that that particular form has already been submitted. Despite this warning provided by the system, users will still be able to submit these forms multiple times. Multiple submissions will result in faulty records. Please stress the importance of proper form submission practices to all users who will be working with the Disconnected User Module.

Disconnected User Expense Entry

The Disconnected User Expense Entry Form is quite similar to the standard online Expense Entry Screen. It uses the assigned period and will display only those Projects, Expense Codes, Sources, and Currencies that the user is allowed to see based upon Group membership. The process of entering expenses into the form follows standard expense entry procedures exactly.

Once expense entries have been entered, the user should simply click the Save Work In Progress button at the bottom of this form. Clicking this button saves all expense entries and stores them locally in a cookie that will continue to hold this form's data until the form is submitted. The user does not need to be connected to the internet to save expense entries.

Once all expense entries have been completed for the period and the user is certain that no changes will need to be made, the user should connect to the internet and click the Email Completed Expense Sheet button at the bottom of the form. This will submit the form to the system.

If a user attempts to resubmit an offline expense form that has already been submitted, a pop-up window will be displayed reminding the user that that particular form has already been submitted. Despite this warning provided by the system, users will still be able to submit these forms multiple times. Multiple submissions will result in faulty records. Please stress the importance of proper form submission practices to all users who will be working with the Disconnected User Module.

Disconnected User Mileage Entry

The Disconnected User Mileage Entry Form is quite similar to the standard online Mileage Entry Screen. It uses the assigned period and will display only those Projects, Measurements, Vehicles, and Reasons that the user is allowed to see based upon Group membership. The process of entering mileage into the form follows standard mileage entry procedures exactly.

Once mileage entries have been entered, the user should simply click the Save Work In Progress button at the bottom of this form. Clicking this button saves all mileage entries and stores them locally in a cookie that will continue to hold this form's data until the form is submitted. The user does not need to be connected to the internet to save mileage entries.

Once all mileage entries have been completed for the period and the user is certain that no changes will need to be made, the user should connect to the internet and click the Email Completed Mileage Sheet button at the bottom of the form. This will submit the form to the system.

If a user attempts to resubmit an offline mileage form that has already been submitted, a pop-up window will be displayed reminding the user that that particular form has already been submitted. Despite this warning provided by the system, users will still be able to submit these forms multiple times. Multiple submissions will result in faulty records. Please stress the importance of proper form submission practices to all users who will be working with the Disconnected User Module.

Disconnected User Project Creation

The Disconnected User Project Creation Form is quite similar to the standard online Project Creation Screen. The process of creating projects using this form follows standard online project creation procedures exactly. The existing viewable project hierarchy is displayed at the top of this form, providing users with a complete view of the existing project tree structure. This view is limited to the projects that are viewable to the user based on Group membership.

Projects created using the offline Project Creation Form will be available immediately for logging time, expenses, and mileage. However, these projects will not appear as part of the project hierarchy in the currently active project creation form. Furthermore, these projects will not be available in your organization's online system installation until the Project Creation Form has been submitted and processed. Finally, these projects will not appear in any other users' currently open offline forms. Again, these projects will be available to other users only after the Project Creation Form has been submitted and processed by the system.

Once all projects have been created and the user is certain that no further projects need to be created, the user should connect to the internet and click the Submit New Projects Email button at the bottom of this form. This will submit the form to the system.

If a user attempts to resubmit an offline project form that has already been submitted, a pop-up window will be displayed reminding the user that that particular form has already been submitted. Despite this warning provided by the system, users will still be able to submit these forms multiple times. Multiple submissions will result in faulty records. Please stress the importance of proper form submission practices to all users who will be working with the Disconnected User Module.

User Passwords

User Passwords is located under Management→Users→ Passwords (see figure 11.1).

The User Passwords section allows you to reset the passwords for users. To reset a user's password, first select the user from the dropdown and then specify the new password that you wish the user to have when logging into the system. You must confirm the password by specifying it again. When finished, click the 'Save' button. This will reset the user's password to the one that you specified. To change the password of another user, simply select the name from the dropdown and follow the same procedure.

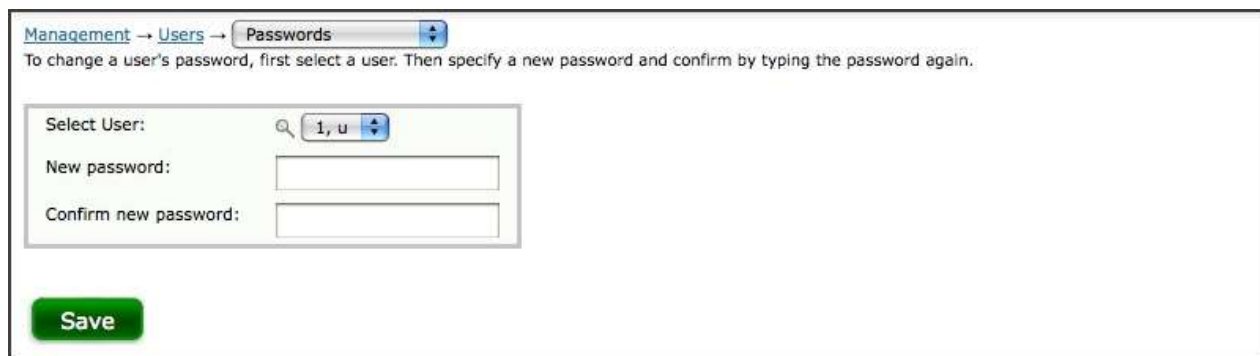
The screenshot shows a web interface for managing user passwords. At the top, there is a breadcrumb trail: "Management → Users → Passwords". Below this, a message states: "To change a user's password, first select a user. Then specify a new password and confirm by typing the password again." The form contains three main input fields: "Select User:" with a dropdown menu showing "1, u", "New password:" with an empty text box, and "Confirm new password:" with another empty text box. A green "Save" button is located at the bottom left of the form area.

Figure 11.1. User password modification

Accruals

Accruals is located under Management→Users→Accruals (see figure 12.1).

The Accruals section allows you to maintain leave request balances for your users. Users who have been assigned accruals may view their leave request balances via an Accruals link at the bottom of their timesheets. Clicking this link will display a section within their timesheet that

will display all the accruals that have been assigned to them along with the type of accrual and remaining hour balances.

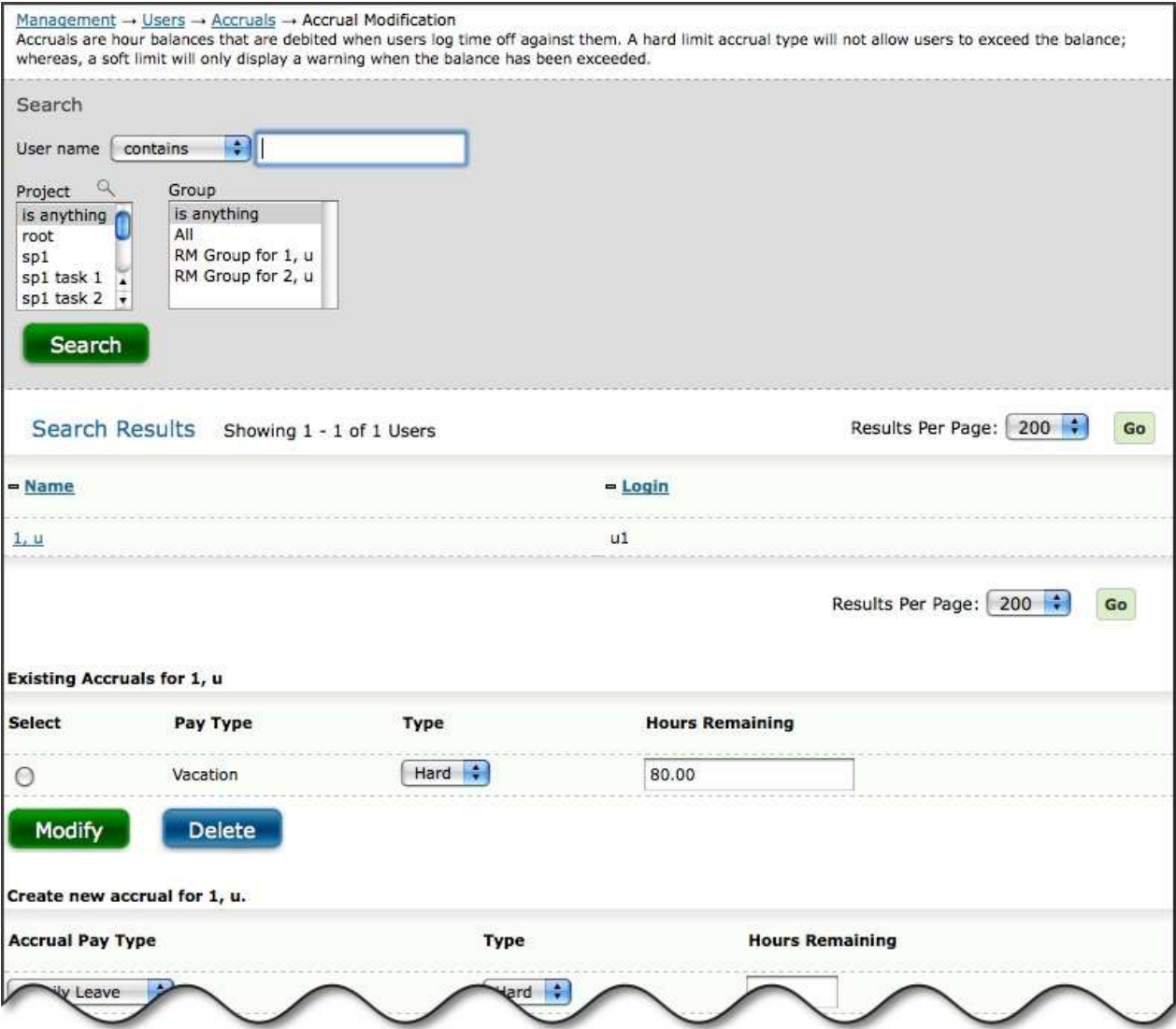


Figure 12.1. User accruals

To create or manage accruals for a user, you must first specify the search criteria for the user. When finished, click the Search button. The search results will be displayed from which you can select a user to manage. Click the user's name. The Accruals Management section will be displayed underneath the search results. If the user already has accruals assigned to him/her, you will be able to see the remaining balances for each assigned accrual. Accruals are associated to the default Pay Type column on time entry screens. As users track time against pay types with existing accrual balances, the balances are debited by the hours entered by the user for that pay type. To reset the hours of the remaining balance to a different value, specify the new hour count value and click the Save button.

To create a new accrual for the user, select the accrual from the dropdown. Then select whether or not it will be a soft accrual type or hard accrual type. A soft accrual type will allow the user to exceed the balance while presenting a warning that the balance has been exceeded. A hard

accrual type will not allow the user to exceed the balance allocated to him/her. Specify the initial hour balance for that accrual. When finished, click the Create button.

To completely delete an accrual that has been assigned to a user, select the accrual and click the Delete button.

Organization Chart Manager and Compliance Viewer

The Organization Chart Manager (OCM) is a configuration tool that automates the set up of a top-down reporting structure and bottom-up approval structure for your organization based on an organization chart (org chart) that you can create and manage in the system. If you have a large number of users, OCM facilitates the process of creating and maintaining their approval plans, as well as the ability to report on them.

The Organization Chart Compliance Viewer (OCV) provides a complete view of time approval status and compliance based on the hierarchy relationships in your org chart. The compliance viewer allows you to quickly locate parts of the organization that are out of compliance, get sheets approved or contact others to take action. The compliance viewer can be used with or without OCM. It will show compliance data regardless of whether the corresponding approval plans were created manually or by OCM.

IMPORTANT NOTE: You cannot use time approval plans that were manually created in tandem with OCM-created approval plans. OCM completely manages the time approval plan list when it is in use. If you plan to create your time approval plans and assign them to users manually, or you already have your time approval plans in place, you have the option to disable OCM under Configuration→System Settings→Security. Disabling OCM does not block you from using OCV for reporting on your manually created approval plans.

Organization Chart Manager

The Organization Chart Manager (OCM) is located under Management→Org Chart→Manage Org Chart.

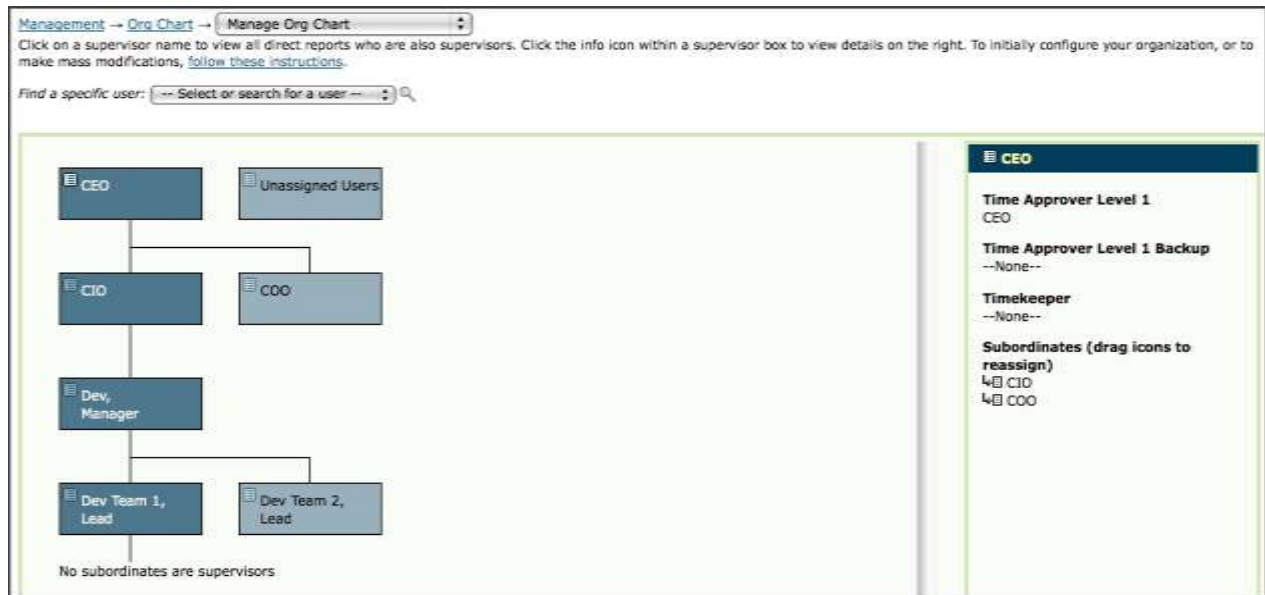


Figure 39.1 Organization Chart Manager

Your system includes default fields and data that allow for quick and easy OCM implementation. The default fields and data include the following:

Time Approval Plan called "Org Time Approval Template"

User Custom Fields called "Supervisor ID", "Backup ID", "Timekeeping Assistant" and "Self-Approve"

Custom Roles called "Org Supervisor Template" and "Org Timekeeping Assistant Template"

These fields and data are required for setting up and updating OCM. If any of the fields or data get deleted, they can always be added back manually. You also have the option to customize the configuration of the approval and role templates. For example, you can edit the email notification settings for the Org Time Approval Template. Any changes made to the template will also apply to the approval plans that OCM generates based on your org chart. For role templates, you can modify the list of supervisor or timekeeping abilities to add and remove access to features in the system.

At the top of the OCM screen, there are instructions for setting up and/or updating OCM. Click on the "follow these instructions" link to show the steps on-screen.

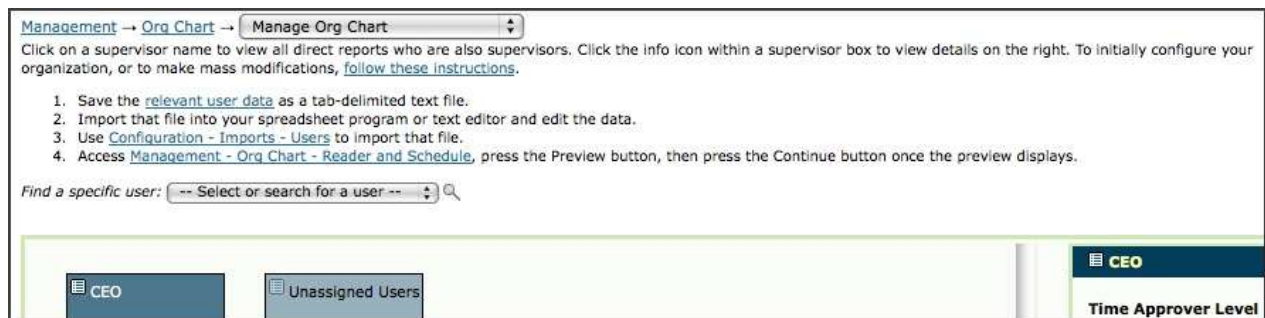


Figure 39.2 OCM Set Up/Update Instructions

The process includes 4 steps:

Export your list of users from the system with the OCM-related custom fields. You can do this by clicking on the “relevant user data” link in step 1 of the on-screen instructions. The link creates a report that can be saved as a text file and opened in a text editor or Excel.

Edit your exported data to include values for Supervisor ID, Self-Approve and Timekeeping Assistant. Every user will need a value in the Supervisor ID unless the user(s) is at the very top of the hierarchy and does not report to anyone. Values in the Supervisor ID field must be login IDs of the people who will approve the users’ timesheets. In the case where a user does not report to anyone higher up in the org chart, the Self-Approve field should be set to Yes. All others who will be governed by OCM can be set to Yes or No for the ability to approve their own timesheets. Backup IDs and Timekeeping Assistants are optional. Backup IDs are the login IDs of users who can act as backup approvers to supervisors. Timekeeping Assistants have access to enter time for the users who report to a supervisor. Supervisors can have more than one timekeeping assistant by creating numeric user custom fields: Timekeeping Assistant 1, Timekeeping Assistant 2, etc. Both Backup IDs and Timekeeping Assistants are assigned to the Supervisor, so Backup ID and Timekeeping Assistant values should be added to the Supervisor’s custom fields when in use. If a Supervisor has his Supervisor Approves Sheets I Approve value set to Yes, then the next level approver on any Approval Plans for which the Supervisor is a primary approver will be his configured Supervisor. In this way, you can set up multi-level Approval Plans that must pass up the chain of command for approval.

Import the field data into the system. You can click on the link in step 3 of the on-screen directions or navigate directly to Configuration→Imports→Users to upload the new field values.

Run the OCM Reader. You can click on the link in step 4 of the on-screen instructions or navigate directly to Management→Org Chart→Reader and Schedule to prompt OCM to set up groups and approval plans based on the new field data. The first time you run OCM, you select the “Generate User Hierarchy from User Custom Fields” option and click on Preview. When you click the Preview button, the Reader will display a list of actions that will be taken if you click Continue. You will see at the top of the Preview screen a list of any errors or warnings. Use these to correct your import before continuing. After you have reviewed the data, click on Continue to run OCM. You can also set up a schedule on this screen for making regular updates to OCM based on changes to the field data in your system. Only system Administrators can run the reader or create scheduled updates.

Figure 39.3 Organization Chart Reader

Other settings to consider when configuring OCM:

The global Approval Plan setting to activate emails.

This always has to be enabled for approval notices to be sent, whether or not you are using

OCM. This setting is found at Configuration→System Settings→Approval Plans and is called “Activate approval emails...”.

The email addresses in each user’s and approver’s custom fields.

If your users and approvers are missing email addresses in their user profiles, the system does not know where to send approval plan (timesheet) notices. All users and approvers must have valid email addresses in order to receive notices regarding timesheets, whether you use OCM or not.

Supervisor access to subordinates under them.

You have the option to give supervisors access to all subordinates under them in the hierarchy, or you can limit access to only the subordinates directly under them. Under Configuration→System Settings→Security Settings you limit access by enabling the “Allow supervisors authority over the entire hierarchy...” setting.

Viewing the Results of OCM

You can view the visual hierarchy that is built from OCM data by going to Management→Org Chart→Manage Org Chart.

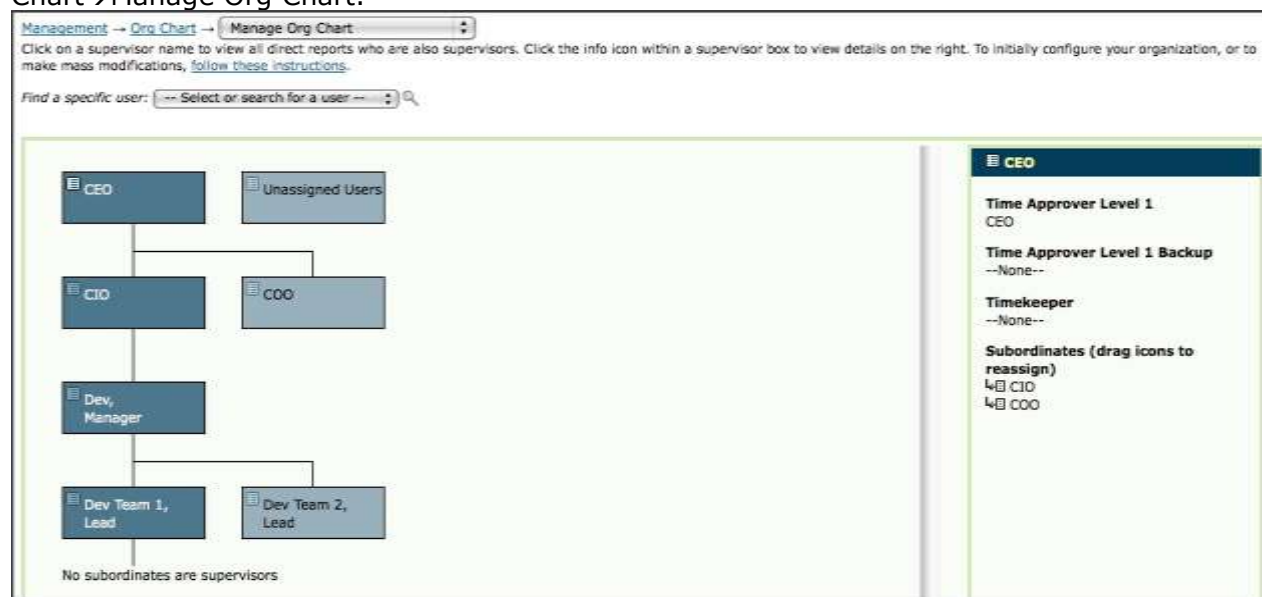


Figure 39.4 Organization Chart Manager

Using the “Find a specific user” drop-down menu, you can navigate to specific locations within the organizational hierarchy derived from your company’s org chart. If you click the name of the manager in the visual hierarchy, the org chart will rearrange itself so that the manager is aligned vertically at the far left and any of his/her direct subordinates who also have direct subordinates will be visible in the tree.

If you pick a user who is a supervisor, that supervisor’s direct subordinates appear in the right pane and the left pane will update to display the supervisor.

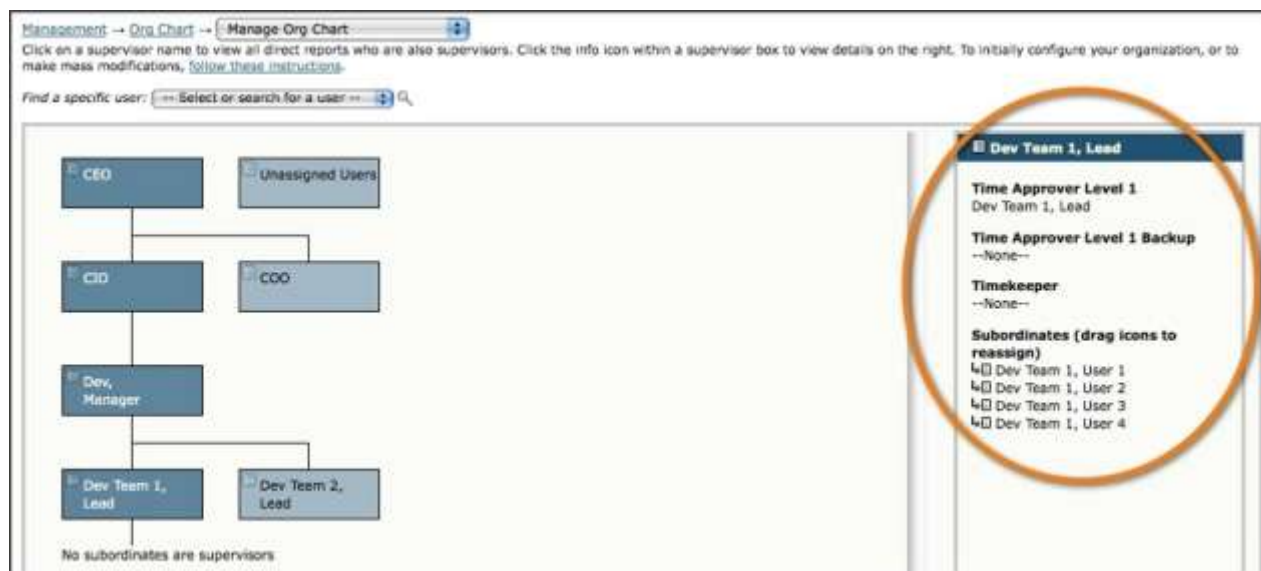


Figure 39.5 Organization Chart Manager

If you pick a user from the drop-down menu who is not a supervisor, that user will appear in a list of users in the right pane who all report to the same supervisor. The supervisor will appear in the left pane hierarchy. For each supervisor, his/her approvers, timekeepers, and direct subordinates appear in the right pane.

To view this information for another supervisor, click the list icon next to the supervisor's name within the visual hierarchy.

You have the option to make changes to reporting relationships directly on the OCM screen. To reassign subordinates to another supervisor, drag and drop them from the right pane onto the new supervisor in the visual hierarchy.

Other data created by OCM:

You will see Groups and Custom Roles that begin with ZZSUP. These are created automatically and assigned automatically when you click run the OCM Reader. Ignore them as they will be used automatically by OCM. Do NOT remove them manually from the users they're assigned to. You cannot modify the ability lists for these roles under Roles Management. However, these automatic role assignments do not override existing assignments for the users. You are free to configure custom roles for users affected by OCM configuration. The roles that are automatically assigned by OCM will simply be added to the users' existing role assignments.

Be sure to continue to use OCM when adding and editing users, approval plan (and manager) assignments. If you do not, when you run the OCM Reader, any related configuration that was added manually will be overwritten.

Organization Compliance Viewer

The Organization Compliance Viewer (OCV) is located under Approvals→Compliance→Organization Compliance.

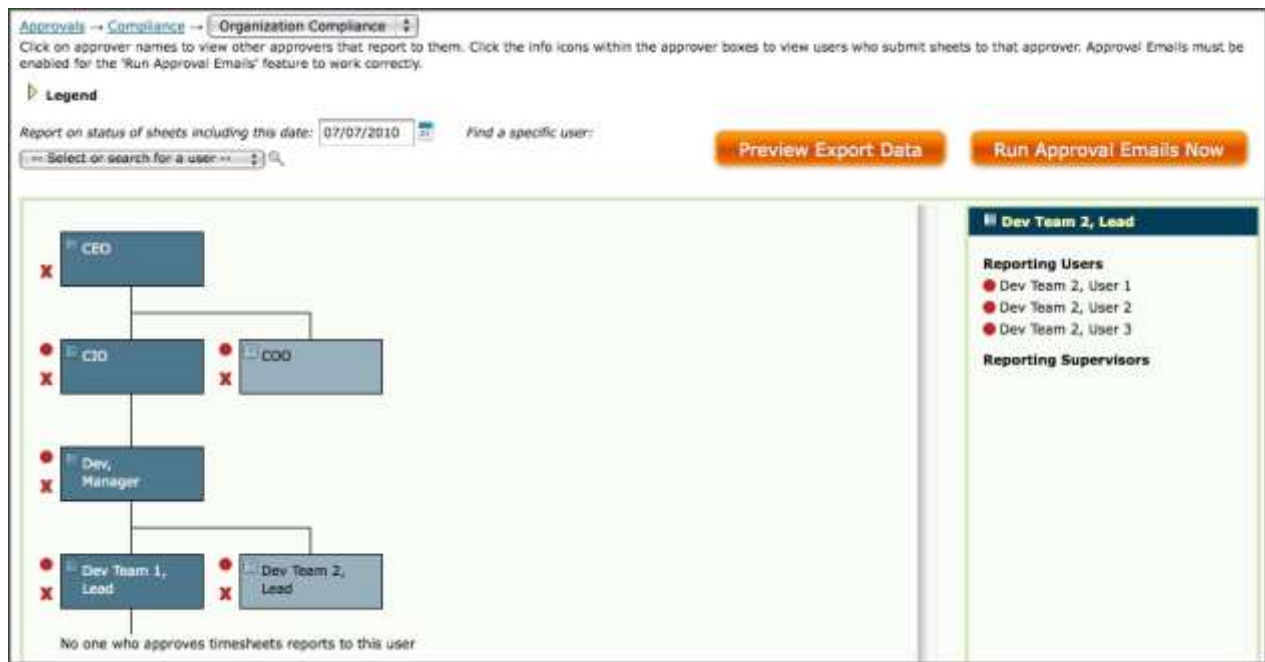


Figure 39.6 Organization Compliance Viewer

OCV is where you can see which users have and have not submitted timesheets (who is in compliance) and which managers in the organization have full or partial subordinate compliance.

Like OCM when you click the list icon next to a manager's name in the visual hierarchy, information about that manager's approval plan and the timesheets of the users assigned to it appear in the right pane. If you click the name of the manager in the visual hierarchy, the org chart will rearrange itself so that the manager is aligned vertically at the far left and any of his/her direct subordinates who also have direct subordinates will be visible in the tree.

If you click the Legend, the details within the Legend will open or close.

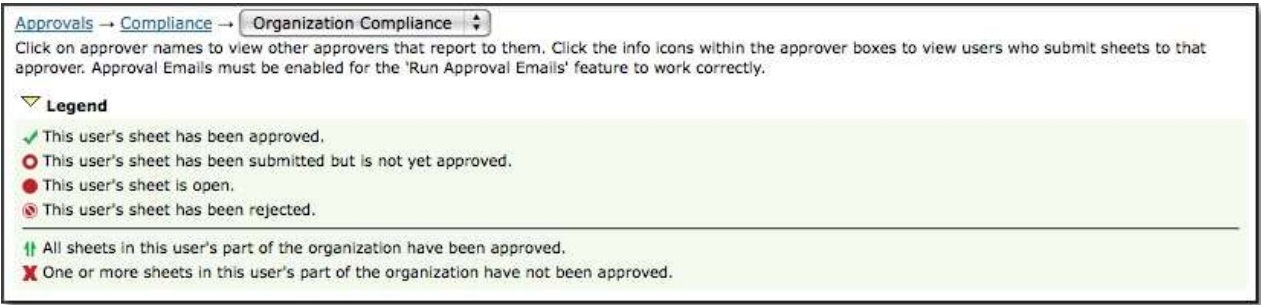


Figure 39.7 Organization Compliance Viewer Legend

This Legend shows which icons correspond to the various status types for approval plans. The first four (4) status icons relate to individual user timesheets and the last two (2) relate to the manager's specific part of the organization. Knowing where individual timesheets are in the system enables managers to help their direct subordinates comply with company policy to submit the timesheets. Additionally, if the manager has appointed a separate approver, the manager can ensure the approver complies by reviewing and approving the submitted timesheets.

At the higher levels, upper-level managers can view which managers have employees with outstanding un-submitted timesheets.

Next to the managers (and the users and supervisors who report to them) you will find various symbols. These are explained in the Legend.

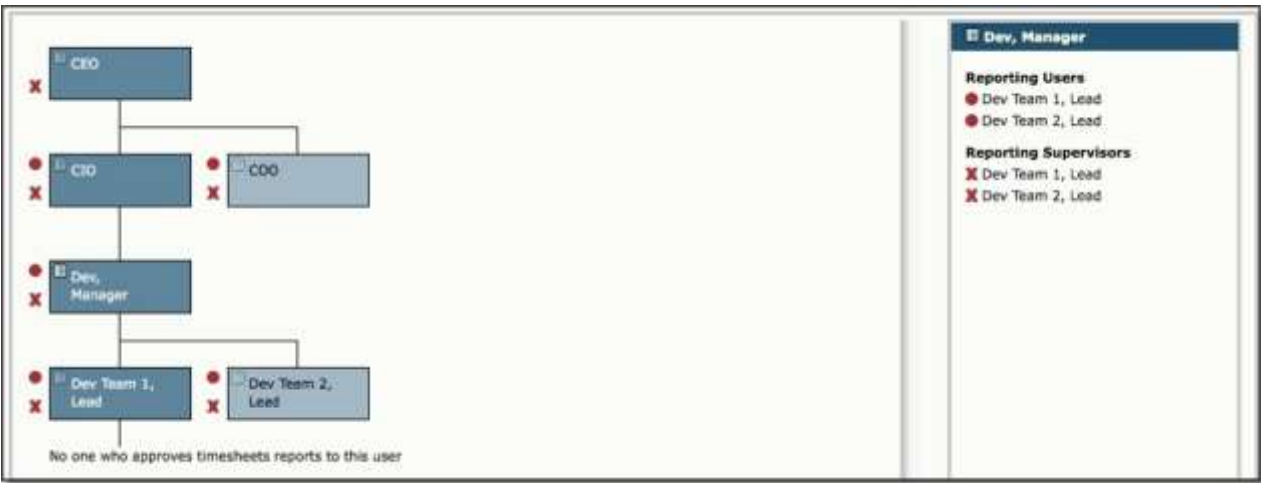


Figure 39.8 Organization Compliance Viewer

If you hover over an icon next to a user in the right pane, a small window pops up with more information about the sheet status of that user.

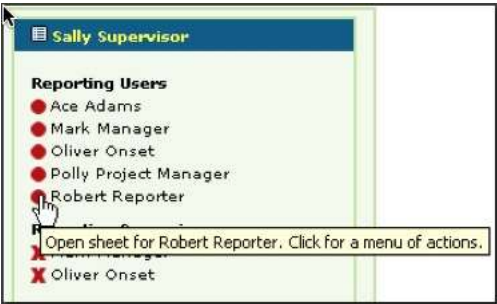


Figure 39.9 Organization Compliance Viewer

If you hover over an icon next to a supervisor in the right pane, a small window pops up with more information about the sheet status for the users who report to that supervisor.



Figure 39.10 Organization Compliance Viewer

If you click the icon next to a user in the right pane, you are presented with a menu of options that you can perform. The first 3 of these actions are email actions; these require that the users have valid email addresses in their user profile. If the users do not have valid email addresses, the links are disabled and appear in light grey italics as shown below.



Figure 39.11 Organization Compliance Viewer

The fourth link will open a user's timesheet in timekeeping mode if you have ability to enter time for others. If the sheet has been submitted but is not approved, you will also see a link to view the sheet in approval mode. The last link will opens a user's profile under Management→Users→Manage Users if you have the ability to modify users.

Organization Compliance Viewer Export

The Organization Compliance Export lets you see who is in compliance across the organization in a report format that can be exported, edited, printed and/or distributed. To access the Organization Compliance Export, go to Approvals→Compliance→Organization Compliance and click on the "Preview Export Data" button.

Approvals → Compliance → Organization Compliance → Org Compliance Export

Export created on Thursday, July 22, 2010.

Export

Org Compliance, Thursday, July 22, 2010

Compliance

Total	Rank 1		Rank 2		Rank 3		Rank 4		Sheet			
	Approver	%	Approver	%	Approver	%	Approver	%	User	Status	Date	Hours
	CEO		CIO		Dev, Manager		Dev Team 1, Lead		Dev Team 1, User 1	Submitted	07/18/2010 - 07/24/2010	40.00
	CEO		CIO		Dev, Manager		Dev Team 1, Lead		Dev Team 1, User 2	No Sheet		0.00
	CEO		CIO		Dev, Manager		Dev Team 1, Lead		Dev Team 1, User 3	Approved	07/18/2010 - 07/24/2010	24.00
	CEO		CIO		Dev, Manager		Dev Team 1, Lead		Dev Team 1, User 4	No Sheet		0.00
	CEO		CIO		Dev, Manager		Dev Team 1, Lead	25.00%				64.00
	CEO		CIO		Dev, Manager		Dev Team 2, Lead		Dev Team 2, User 1	No Sheet		0.00

Figure 39.12 Organization Compliance Export

The report results are shown for the day the report is run. You have the option to export to text, save or email the report from this screen.

User Compliance Report

The User Compliance Report is located under Approvals→Compliance→User Compliance→User Compliance Report (see figure 28.17).

The User Compliance Report allows you to create reports that will display the status of users' sheets for the date range specified. You may choose to display all users or users that were late submitting their sheets. Only the statuses of one type of sheet may be displayed – either timesheets, expense sheets, or mileage sheets. Once you have specified the criteria, you may choose which Custom Fields and Approvers to display in the report as well.

Approvals → Compliance → User Compliance → User Compliance Report

User Compliance Export

This tool displays user sheets that meet the criteria you specify. These criteria are:

- **Show Sheets surrounding what date range?**
Enter a start date and an end date in the same format as the default values which are displayed. Only sheets which contain at least one day in this range will be displayed.
- **Show which users?**
This field allows you to specify whether or not to display only those sheets which have not been submitted on time.
- **Show which kind of data?**
This field allows you to select the type of sheets to display: time, expense, or mileage.
- **Include users in these groups:** This field allows you to limit the users that will be included in the report based on their group memberships.
- **Include data for which users?** Previous behavior for sheet status reports only displayed sheet status for users with time, expense, or mileage entry capability and a current approval plan. Uncheck this box to include *all* users in the requested period who have a sheet or should have one, whether or not the users in question currently have entry capabilities and approval plans.
- **Show which user custom fields?** You may select as many user custom fields as you would like to have included on the report.
- **Show which approval fields?** You may choose to display, for each level of approval configured in the system, whether to display the assigned approver, backup approver, or approval date.

After you have entered values in all these fields, click preview to view the report. The preview screen will provide you with options for exporting the data or saving it on the server.

Run Now

Show Sheets surrounding what date range? 06/01/2010 06/30/2010

Show which users? Late People

Show which kind of data? Time

Include users in these groups: All, ZZ SELF: admin1, ZZ SELF: ceo, ZZ SELF: meredith, ZZ SUP: am

Include data for which users? ☒ Show only users with active approval plans and time entry capability

Show which user custom fields? Backup ID, Department, Email Address, Employee End Date, Employee Number, Employee Start Date, Employee Type, Manager Name, Project File ID

Figure 28.17. User Compliance Report

User Compliance Preferences

User Compliance Preferences is located under Approvals→Compliance→User Compliance→User Compliance Preferences. Within the User Compliance Preferences section, you can specify the default email address to send export files, the newline character format, the field delimiter, header row display preference, and the default file destination for saved reports (see figure 28.18). When finished specifying your preferences, click the Save button.

Approvals → Compliance → User Compliance → User Compliance Prefs

Configure preferences for User Compliance reporting.

Report Settings

Default email address when export files are sent:

Newline character format:

Windows

Field delimiter (please note that the chosen character will be stripped from actual field values):

Tabs

☐ Show header row in text export?

Default file destination for saved exports:

/u/meredith/s/px80/dist/pkg/Linux/xx/tmp/UserComplianceExport.txt

Save

Cancel

Figure 28.18. User Compliance Preferences

User Compliance Access

User Compliance Access is located under Approvals→Compliance→User Compliance→User Compliance Access. Within the User Compliance Access section, you can specify which roles will have access to sheet status reports (see figure 28.19). You may also select multiple roles by using the ctrl-click or shift-click functionality. When finished, click the Save button.

Approvals → Compliance → User Compliance → User Compliance Access

Configure user access to User Compliance reporting.

Report Access

Export - User Compliance

Administrator

Dashboard User

DC Access

Expense User

Manager

Save

Cancel

Figure 28.19. User Compliance Access

Punch Conversions

Punch Conversions are located under Management→Records→Punch Conversions.

Punch-in and punch-out pairs are in and out times submitted by users who track time using the punch clock feature ("Punch User"). These punch-in/punch-out pairs require approval before being converted to time records. A punch pair containing two consecutive punches constitutes a time entry (see figure 13.1).

Management → Records → Punch Conversions

Punch-in and punch-out pairs entered by Punch Users must be converted to time records. A punch pair containing two consecutive punches constitutes a time entry. You may insert a punch entry in-between a punch pair.

Manage unconverted punch records: click on the user name.

Select a User to Work With	Number of Unconverted Punches
1, punchuser	6

Figure 13.1. Punch Conversions main page

To manage punch entries for a user, you must first select the user to manage. Click the name of the user to manage. You will be directed to a page that contains all of that user's unapproved punch-in and punch-out pairs (see figure 13.2). You can approve all the punch entry pairs shown by clicking the Approve All button.

Management → Records → Punch Conversions → Punch Record Conversion

Punch-in and punch-out pairs entered by Punch Users must be converted to time records. A punch pair containing two consecutive punches constitutes a time entry. You may insert a punch entry in-between a punch pair.

Unconverted punch records for 1, punchuser

Edit/Del	Punch In Time	Insert	Punch Out Time	Edit/Del	Elapsed Time (out-in)
	Thu Jul 22 09:55:31 2010		Thu Jul 22 09:56:34 2010		0:01
	Thu Jul 22 09:57:00 2010		Thu Jul 22 09:58:52 2010		0:02
	Thu Jul 22 09:59:04 2010		Thu Jul 22 10:00:53 2010		0:02

[Approve All](#)

Figure 13.2. User Punch Conversions

To edit a punch, click the respective Edit icon for that punch. This will direct you to a page containing the attributes of that punch which you will be able to modify (see figure 13.3). Here you can modify the Project, Task, Pay Type, Bill Type, Comment, Punch Time, Group, and whether the first or second punch will determine the time record contents. Basically, the first punch and the second punch could potentially have different attributes for Project, Task, Pay Type, Bill Type, and Comment. This dropdown determines which values to write to the database if there is a discrepancy. When finished, click the Modify button. All punch screens include a default setting for determining whether to use the first or second punch details for the time record that is created.

[Management](#) → [Records](#) → [Punch Conversions](#) → Punch Record Modification

Punch-in and punch-out pairs entered by Punch Users must be converted to time records. A punch pair containing two consecutive punches constitutes a time entry. You may insert a punch entry in-between a punch pair.

ID	90F670922C5645C5BE0BBA404C0E1F04
Project	root
Activity	Other
Pay Type	Other
Bill Type	Standard
Comment	Hourly Worker Punch
PunchDateTime	20100722 09:57
First or second punch determines time record contents?	First
Group	All

[Modify](#)

Figure 13.3. Punch Record modification

You may also insert a punch entry between a punch pair from the screen containing all of the user's punches (see figure 13.2). To insert a punch entry between a pair, click the Insert icon located between the two punches. This will direct you to a screen where you can specify the Project, Task, Pay Type, Bill Type, Comment, Punch Time, Group, and whether the first or second punch will determine the time record contents (see figure 13.4). When finished, click the Create button. This will insert the punch between the original pair that you chose. By inserting a punch entry, this will sequentially shift all following punches. In other words, all punch-in entries following the insertion will be converted to punch-out entries. Similarly, all punch-out entries following the insertion will be converted to punch-in entries.

[Management](#) → [Records](#) → [Punch Conversions](#) → Punch Record Modification

Punch-in and punch-out pairs entered by Punch Users must be converted to time records. A punch pair containing two consecutive punches constitutes a time entry. You may insert a punch entry in-between a punch pair.

✓ **Modify the values below. Press the button to create this new Punch record for 1, punchuser**

ID	
Project	root
Activity	Clerical
Pay Type	Family Leave
Bill Type	Billable
Comment	This punch record added by meredith on Thu Jul 22 10:25:06 2010
PunchDateTime	20100722 09:57
First or second punch determines time record contents?	First
Group	All

[Go Back to Punch List for 1, punchuser.](#) [Create](#)

Figure 13.4. Punch Record creation

Records Management

Records Management is located under Management→ Records.

Records Management allows you to create time, expense or mileage entries that will be placed in the selected users' timesheets, expense sheets or mileage sheets. You can also modify entries that already exist in users' sheets.

Time Records

To create a new entry to be placed in users' timesheets, go to Management→ Records→Create Time Entries. This will direct you to the Time Entry Creation screen (see figure 14.1). Specify the users within the Groups that you wish to assign the entry to. For the time entry, specify the Date, Project, Task, Pay Type, Bill Type, Hours, Minutes, and Comment. Then specify whether the entry will be committed or not. When you commit an entry, it will be approved and can no longer be modified regardless of whether the selected users' timesheets are approved or not. When finished, click the Create button.

Figure 14.1. Time Record creation

To modify existing time entries for users, go to Management→ Records→Modify Time Entries. You must first specify the search criteria for the entries and click the Show button (see figure 14.2). From the search results, you can select the entries to manage (see figure 14.3).

Figure 14.2. Time Record search

Management → Records → Modify Time Entries

2 Time Records were found

Your Search Found These Time Records

Select	User Name	User Login	Date	Group	Project	Activity	Pay Type	Bill Type	Record Status	Sheet Status	Hours	Comment
<input type="checkbox"/>	Dev Team 1, User 2	dtlu2	Thursday, July 22, 2010	All	root	Other	Regular	Standard	Open	Open for Entry	8.0	Default Comments
<input checked="" type="checkbox"/>	Dev Team 1, User 1	dtlu1	Thursday, July 22, 2010	All	root	Other	Regular	Standard	Approved/Committed Period Approved	Approved	8.0	Default Comments

Figure 14.3. Time Record selection

To delete the selected entries, click the Delete button. To approve or commit the selected entries, click the Approve/Commit button. To disapprove or uncommit the selected entries, click the Unapprove/Uncommit button. To modify the selected entries, click the Go to Modify Screen button. This will direct you to an Entry Management screen where you can change the Project, Task, Pay Type, Bill Type, Comment, Hours, and Group (see figure 14.4). When finished, click the Modify the Records Altered Above button.

Management → Records → Modify Time Entries

Change the records. Then press the modify button to save your changes.

User	Date	Activity	Pay Type	Project	Hours	Comment	Bill Type	Group
search Dev Team 1, User 2	07/22/2010	search Other	search Regular	search root	tree 8	Default Comments	search Standard	All

Figure 14.4. Time Record modification

Expense Records

To create a new entry to be placed in users' expense sheets, go to Management→Records→Create Expense Entries. This will direct you to the Expense Entry Creation screen (see figure 14.5). Specify the users within the Groups that you wish to assign the entry to. For the expense entry, specify the Date, Project, Expense Code, Source, Currency, Amount, and Comment. Then specify whether the entry will be committed or not. When you commit an entry, it will be approved and can no longer be modified regardless of whether the selected users' expense sheets are approved or not. When finished, click the Create button.

Management → Records → Create Expense Entries

Date	User	Project	Expense Code	Source	Currency	Amount	Comment	Committed
07/22/2010	1, punchuser Accounting, Manager Accounting, User 1	root	Airfare/Rail	Company	AUS			No

Figure 14.5. Expense Record creation

To modify existing expense entries for users, clicgo to Management→Records→Modify Expense Entries. You must first specify the search criteria for the entries and click the Show button (see figure 14.6). From the search results, you can select the entries to manage (see figure 14.7).

Figure 14.6. Expense Record search

Figure 14.7. Expense Record selection

To delete the selected entries, click the Delete button. To approve or commit the selected entries, click the Approve/Commit button. To disapprove or uncommit the selected entries, click the Unapprove/Uncommit button. To modify the selected entries, click the Go to Modify Screen button. This will direct you to an Entry Management screen where you can change the Project, Expense Code, Source, Currency, Comment, Amount, and Group (see figure 14.8). When finished, click the Modify the Records Altered Above button.

Figure 14.8. Expense Record modification

Mileage Records

To create a new entry to be placed in users' mileage sheets, go to Management→Records→Create Mileage Entries. This will direct you to the Mileage Entry Creation screen (see figure 14.9). Specify the users within the Groups that you wish to assign the entry to. For the mileage entry, specify the Date, Project, Measurement, Reason, Vehicle, Comment, and Mileage. Then specify whether the entry will be committed or not. When you commit an entry, it will be approved and can no longer be modified regardless of whether the selected users' mileage sheets are approved or not. When finished, click the Create button.

Figure 14.9. Mileage Record creation

To modify existing mileage entries for users, go to Management→Records→Modify Mileage Entries. You must first specify the search criteria for the entries and click the Show button (see figure 14.10). From the search results, you can select the entries to manage (see figure 14.11).

Figure 14.10. Mileage Record search

Figure 14.11. Mileage Record selection

To delete the selected entries, click the Delete button. To approve or commit the selected entries, click the Approve/Commit button. To disapprove or uncommit the selected entries, click the Unapprove/Uncommit button. To modify the selected entries, click the Go to Modify Screen button. This will direct you to an Entry Management screen where you can change the Project, Measurement, Reason, Vehicle, Comment, Mileage, and Group (see figure 14.12). When finished, click the Modify the Records Altered Above button.

Management → Records → Modify Mileage Entries

Change the records. Then press the modify button to save your changes.

User	Date	Project	Reason	Distance	Comment	Measurement	Vehicle
<div>search</div> <div>Dev Team 1, User 2</div>	<div>07/22/2010</div>	<div>search tree</div> <div>root</div>	<div>search</div> <div>Contract Negotiation</div>	<div>50</div>	<div>Default Comments</div>	<div>search</div> <div>mi</div>	<div>search</div> <div>Vehicle A</div>

Modify the records altered above

Figure 14.12. Mileage Record modification

User Sheet Deletion

Under Management→Records→Delete User Sheets, you also have the option to delete sheets that were created. This scenario usually arises from users navigating to periods in the past or future by accident and thereby "creating" the sheet for email notification purposes. The User Sheet Deletion screen allows you to search for user sheets and delete any that have 0 hours associated with them.

Groups

Groups is located under Management→Groups (see figure 17.1). Groups are used to organize data and control user access to items such as Projects, Tasks, Pay Types, Bill Types, Time Entry Screens, etc. Groups may be thought of as sets that contain one or more users and projects, tasks, etc. that those users can access. Each user can be assigned to one or more Groups, and each item such as a Project, Task, Pay Type, etc. can be assigned to one or more Groups. Groups are the ultimate access control devices in the system and as such require particular attention.

Management → Groups → Manage Groups

Groups allow you to grant access to and associate users with Roles, Projects, Tasks, Sheets, etc. Specify the search criteria for the Groups you would like to manage. Click on the Group name to modify its settings.

Search

Group name or description: contains Group type is: Normal

Search

Search Results Showing 1 - 3 of 3 Groups Results Per Page: 10 **Go**

Name	Description	Type	Modify
<input type="checkbox"/> All	All Objects	Normal	Choose/View
<input type="checkbox"/> Group 1	All group 1 users	Normal	Choose/View
<input type="checkbox"/> Group 2	All group 2 users	Normal	Choose/View

0 selected [Select All](#) Results Per Page: 10 **Go**

Delete **Create**

Note: The All Group contains all objects in the product. Users who are included in the All Group have access to all Projects and Entry Column values.

Caution should be used when removing items from the 'All' Group.

Figure 17.1. Groups main page

The All Group

In addition to Groups that the administrator creates to establish the order within an organization, the system contains one default Group that is consistent across all installations - the All Group. Every installation of Timesheet contains a Group named 'All'. This Group contains each item created within the system. Every non-user item must exist in this Group or it may become inaccessible. Users may be removed from the All Group once they have been placed into at least one other Group or if their statuses have been changed to 'hidden'. To facilitate these requirements, modification of the All Group has been limited by default. Without making a change to the System Settings, only users may be removed from the All Group. It is highly recommended that only users be removed from the All Group. All other changes to the All Group should be avoided.

Creating and Managing a Group

To create a new Group, click the Create button on the main Groups screen located under Management→Groups. This will direct you to the Group Creation screen where you can specify the name and description of the Group (see figure 17.2).



Management → Groups → Create Group

Enter a name and description for the Group you would like to create. Check the Work Request Group check box if you are creating a Work Request Group.

New Group Name	New Group Description	Work Request Group
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Figure 17.2. Group creation

Once saved, select the newly created Group from the main Groups screen (see figure 17.1). This will take you to the Groups Management Screen (see figure 17.3). Here you will select the items that are to belong to the Group along with the users that will have access to these items. In other words, assigned users will be able to log time, expense, and mileage against the assigned items as these items will be displayed in dropdowns within their timesheets, expense sheets, and mileage sheets. For each item displayed, the listbox to the left contains the available items and the listbox to the right contains the items that have been assigned to the Group. You can use the ctrl-click and shift-click functionality to select multiple items. Once you have selected the items to assign to the Group from the left listboxes, click the Save button. Upon refresh, you will see that the items you selected are now in the listboxes to the right. Note that if you have set up projects with dependencies, you need to make sure that you include at least one valid item for each entry field for the projects included in the Group. Otherwise, the users in the group may be unable to log time, expense, or mileage to the project.

Management → Groups → Manage Groups → Modify Group
 To modify a Group, select from the lists of available objects and place them in the assigned objects list.

Group 1 Group Description: All group 1 users

Modify Group assignments for Group 1

Section	All Items (Select to Add)	Items In Group (Select to Remove)
User	All User(s) 1, punchuser Accounting, Manager Accounting, User 1 Accounting, User 2 admin1	User(s) in Group Dev Team 1, User 1 Dev Team 1, User 2 Dev Team 1, User 3
Role	All Role(s) Administrator Dashboard User DC Access Expense User Manager	Role(s) in Group Administrator Dashboard User DC Access Expense User Manager
Project	All Project(s) root	Project(s) in Group root
Activity	All Activity(s) Clerical Coding CorpAdmin Debugging Design/Plan	Activity(s) in Group Other
Pay Type	All Pay Type(s) Family Leave Holiday Jury Duty Sick	Pay Type(s) in Group Other Regular

Figure 17.3. Group modification

To modify an existing Group, specify the search criteria in the main Groups screen (see figure 17.1). You can search by Group name, description and type. If a Group is created manually under Group Management or via Group Imports, it is labeled "Normal". If a Group is created automatically via the Journyx Projectlink integration for MS Project, it is labeled as a "Projectlink" type Group. If a Group is created automatically via the Organization Chart Reader, it is labeled as a "System Created" type Group. If a Group is created automatically as a result of an assignment to a scheduled project/task, it is labeled as an "Assignment" type Group. Assignment Groups are created automatically when users are assigned to scheduled projects/tasks and ensure they have access to their assignments for review and time/expense entry. When finished specifying the search criteria, click the Search button. The search results will be displayed below the criteria. From the search results, click the Group name. This will direct you to the Group Management screen where you can select the users and items to assign to the Group (see figure 17.3). Alternatively, you can select the category that you want to manage for the Group by selecting it from the respective Modify column from within the search results (see figure 17.1). When finished making modifications, click the Save button.

To delete a Group, select the Group from the main Groups screen and click the Delete Group button (see figure 17.1). Remember that if a user has been removed from the All Group and does not exist in at least one other Group, that user will be changed to 'hidden' status and will not be able to login until he/she is returned to 'active' status under Management-

>User Management. Therefore, if you will be deleting a Group, please ensure that users in that Group still requiring system access are reassigned to another Group beforehand. Also, keep in mind that access to every item is controlled through the Group structure. If you delete the only Group that contains a particular item without first putting that item into another Group that your Users can access, that item will be inaccessible to everyone who might still need access to it.

Projects

Management of Projects is located under Management→Projects→Manage Projects. The system allows you to create an unlimited number of projects for users to log their time, expenses, and mileage against. The system uses a hierarchical project structure and allows unlimited levels of subprojects under any parent project. The main Project screen serves as the master control panel for all project creation, modification, and deletion (see figure 18.1).

Management → Projects → Manage Projects

Specify the criteria for the Projects you would like to manage. Click on the Project name to modify its settings. You may also select multiple Projects to Compare and Modify or use Batch Modification to make changes to many Projects at once.

Search

Project name or description contains

Group

is anything

All

Group 1

Group 2

ZZ SELF: admin1

Project Parent

is anything

(2) Project 1

(1) root

Status

Loggable and Reportable

Reportable Only

Hidden

Owner

is anything

Accounting, Manager

Dev Team 1, Lead

Dev Team 2, Lead

Dev, Manager

Backup Owner

is anything

Accounting, Manager

Dev Team 1, Lead

Dev Team 2, Lead

Dev, Manager

Search

Search Results

Showing 1 - 4 of 1 Projects

Results Per Page: 10

Go

Tree	Project Name	Description	Owner	Backup Owner	Parent	Status	% Comp.	Est. Hours	Create
▼	root	Default Parent Project			root	LR	0.00%	0.00	Create
▼	Project 1	Top of Project 1	Dev Team 1, Lead		root	LR	0.00%	250.00	Create
▼	P1: Task 1	Task 1 for Project 1	Dev Team 1, Lead		Project 1	LR	0.00%	100.00	Create
▼	P1: Task 2	Task 2 for Project 1	Dev Team 1, Lead		Project 1	LR	0.00%	150.00	Create

0 selected

Results Per Page: 10

Go

Compare and Modify

Delete

Create

Figure 18.1. Project Management main page

Project Management System Settings

There are several Project System Settings that can be managed under Configuration→System Settings→Project Settings. These settings should be considered and configured prior to creating new projects. For more information about these settings, see the System Settings section of this manual.

Creating Projects

One of the first actions that should be performed on any new installation of Timesheet is the creation of the various projects that your organization will be using for time, expense, and mileage tracking. You can create a new project under the root by clicking the Create button located in the lower right corner of the screen. This will direct you to the Project Creation screen, where you can specify the attributes of the Project (see figure 18.2).

Copy the settings of Project: P1: Task 1 Load

Name: <input style="width: 100%;" type="text"/> Description: <input style="width: 100%;" type="text"/> Parent: <input style="width: 80%;" type="text" value="root"/> Backup owner: <input style="width: 80%;" type="text" value="None"/> Children: (None)	Status: Loggable and Reportable Total estimated hours: <input style="width: 50%;" type="text" value="0"/> Owner: <input style="width: 80%;" type="text" value="None"/> <input type="checkbox"/> Update all descendants with owner changes Percent complete: <input style="width: 50%;" type="text" value="0"/> Groups: <div style="border: 1px solid black; padding: 2px;"> Group 1 Group 2 ZZ SELF: admin1 ZZ SELF: ceo </div> <input type="checkbox"/> Add this Project to all new Groups
Project Type: 	
Created by: meredith (meredith)	

Other Project Settings

Project Dependencies	Not Available
Project Approvals	Not Available

Custom Fields

Project Bill Rate Type: Hourly Project Bill Rate: <input style="width: 100%;" type="text"/> Project Pay Rate Type: Hourly Project Pay Rate: <input style="width: 100%;" type="text"/> Project State: <input style="width: 100%;" type="text"/> Priority: New Budget: <input style="width: 100%;" type="text"/> Start Date: <input style="width: 80%;" type="text"/> End Date: <input style="width: 80%;" type="text"/>	MS Project ID: <input style="width: 100%;" type="text"/> MS Project File ID: <input style="width: 100%;" type="text"/> Customer Name: <input style="width: 100%;" type="text"/> MS Project End Date: <input style="width: 80%;" type="text"/> MS Project File Name: <input style="width: 100%;" type="text"/> MS Project Start Date: <input style="width: 80%;" type="text"/> QuickBooks File ID: <input style="width: 100%;" type="text"/> QuickBooks ID: <input style="width: 100%;" type="text"/>
---	---

Figure 18.2. Project creation

Specify a name for the Project. Although the system allows up to 252 characters for each project name, Journyx recommends short project names in order to keep the project dropdown menus on user entry screens more manageable. Enter a description for the new projects. Again, the system allows up to 252 characters for the description of each project. The description should be used to provide further details of the project. Notice that the parent project is root. Creating projects under other projects will be discussed later.

The Owner and Backup owner selection fields are optional. The purpose of establishing ownership is to limit project modification access, regardless of Group membership, to the owner and backup owner. If both fields are set to None, any user with group access to the project, Manager Authority and role abilities for modifying projects will be able to modify the project. If a Project Manager is designated as a project's owner, other Project Managers with group access to the project will not be able to modify the project. They will see a read-only view. The creator of the project and any system Administrators are the only ones who can set a project owner and will always be able to modify the project regardless of

ownership. Project owners can change the owner field, as well as set/change the Backup owner field.

Quick Guide to Project Access Rights

Account Type	Projects	Read Only	Edit Access
Administrator	All projects		x
Project Creator	Projects created		x*
Project Manager/Owner	Projects in Groups		x
Project Manager/Backup Owner	Projects in Groups		x**
Project Manager/Non-Owner	Projects in Groups	x	

*Creator has edit access until a project owner is set|

**Backup owner has edit access for all project fields except the owner field.

Next, specify the status of the project: Loggable and Reportable, Reportable Only, Hidden. 'Loggable and Reportable' indicates that the project is fully active (i.e., users can log time to this project and all time logged to this project can be reported on). 'Reportable Only' indicates that the project can no longer have time logged against it, but any historical time already logged can be displayed in reports. 'Hidden' indicates that the project can neither be logged against nor can it be reported on. Enter the total estimated hours and percent complete for the new project. The system allows up to 8 digits for each project's estimated hours. The percent complete field is a manual estimate and does not include any calculations based on actual versus estimated hours. Next select which currently existing Groups should have access to the new projects. Multiple Groups may be selected by using the shift-click or ctrl-click functionality. You can always change which Groups have access to any given project later by modifying that particular Group or by modifying that specific project. Once you have selected the existing Groups that will have access, indicate whether to add this project to new Groups. If you check this option, the project will be added to every new Group that is created in the system at the time of Group creation. If you do not check this option, the newly created Group will not have access to this project by default, but can be given access at a later time by modifying that particular Group or modifying that specific project. When finished specifying the primary attributes, you may optionally configure the Custom Fields for the project. When finished, click the Save button. To create another project, click the Save and New button.

Alternatively, on the Project Creation screen you can copy the settings of another project by searching and selecting a project and then clicking the Load button located at the top right corner (see figure 18.3). This will prepopulate that project's settings (with the exception of MS Project and QuickBooks Custom Fields, Dependencies, and Project Approval Plans) which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new project. When finished selecting and specifying attributes for the new project, you can simply click the Save button.

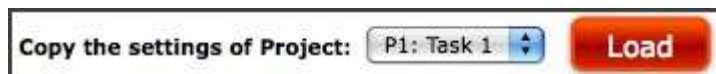


Figure 18.3. Copy another project

You can manage Project Dependencies and Project Approval Plans for each project only after it has been saved and then modifying the project. For more information about Project

Dependencies, see the Project Dependencies section of this manual. For more information about Project Approval Plans, see the Project Approval Plans section of this manual.

Creating Subprojects

The system allows you to create projects under the root project as well as under other projects. Creating subprojects under projects can be done from the main Projects screen. To create a subproject under a project, click the respective 'Create' link in the last column of the parent project (see figure 18.1). This will direct you to the Project Creation screen, where you can specify the attributes of the Project (see figure 18.2). Notice that the parent is the project that you decided to create a subproject for. When finished specifying the primary attributes, you may optionally configure the Custom Fields for the subproject. When finished, click the Save button. To create another project, click the Save and New button.

Alternatively, on the Project Creation screen you can copy the settings of another project by searching and selecting a project and then clicking the Load button located at the top right corner (see figure 18.3). This will prepopulate that project's settings (with the exception of MS Project and QuickBooks Custom Fields, Dependencies, and Project Approval Plans) which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new subproject. When finished selecting and specifying attributes for the new project, you can simply click the Save button.

You can manage Project Dependencies and Project Approval Plans for each subproject only after it has been saved and then modifying the subproject. For more information about Project Dependencies, see the Project Dependencies section of this manual. For more information about Project Approval Plans, see the Project Approval Plans section of this manual.

Modifying, Reparenting, and Deleting an Existing Project

To modify an existing project, specify the search criteria for the project on the main Project screen and click the Search button (see figure 18.1). The search results will be displayed below the criteria. From the search results, click the name of the project you would like to modify. This will direct you to the Project Modification screen where you can modify the attributes of the project (see figure 18.4).

From within the Project Modification screen, you can reparent the project. The screen shows the current parent project of the project being modified. Simply select another parent project if you wish to place the project under a different parent project within your project hierarchy. In order for users to reparent projects for which they have access to, users must be granted the 'Project-Modify' ability when configuring Roles.

Alternatively, you have the ability to compare and modify multiple projects at the same time. From the search results on the main Project screen, check the checkboxes of the projects that you would like to manage at once (see figure 18.1). Then go to the bottom of the screen and click the Compare and Modify button. This will take you to a Project Modification screen that contains the attributes of the selected projects side by side (see figure 18.5).

Copy the settings of Project: P1: Task 1

Load

Name:Project 1

Description:Top of Project 1

Parent:root

Backup owner:None

Children:Project 1 has 2 Projects directly under it.
Create a new child Project

Project Type:

Status:Loggable and Reportable

Total estimated hours:250.00

Owner:Dev Team 1, Lead
☐ Update all descendants with owner changes

Percent complete:0.00

Groups:

Group 1
Group 2
ZZ SELF: admin1
ZZ SELF: ceo

☐ Add this Project to all new Groups

Created by:meredith (meredith)

Other Project Settings

Project Dependencies

Project Approvals

Modify Entry Column Dependencies

Modify Project Approval Settings

Custom Fields

Project Bill Rate Type:Hourly

Project Bill Rate:

Project Pay Rate Type:Hourly

Project Pay Rate:

Project State:

Priority:New

Budget:

Start Date:

End Date:

MS Project ID:

MS Project File ID:

Customer Name:

MS Project End Date:

MS Project File Name:

MS Project Start Date:

QuickBooks File ID:

QuickBooks ID:

Figure 18.4. Project modification

Management → Projects → Manage Projects → Modify Projects

To modify a Project, enter values in the fields below.

Name:	P1: Task 1	P1: Task 2
Status:	Loggable and Reportable	Loggable and Reportable
Description:	Task 1 for Project 1	Task 2 for Project 1
Total estimated hours:	100.00	150.00
Parent:	Project 1	Project 1
Owner:	Dev Team 1, Lead	Dev Team 1, Lead
	<input type="checkbox"/> Update all descendants with owner changes	<input type="checkbox"/> Update all descendants with owner changes
Backup owner:	None	None
Percent complete:	0.00	0.00
Children:	P1: Task 1 has 0 Projects directly under it.	P1: Task 2 has 0 Projects directly under it.
	Create a new child Project	Create a new child Project
Groups:	<div>Group 1</div> <div>Group 2</div> <div>ZZ SELF: admin1</div> <div>ZZ SELF: ceo</div> <div><input type="checkbox"/> Add this Project to all new Groups</div>	<div>Group 1</div> <div>Group 2</div> <div>ZZ SELF: admin1</div> <div>ZZ SELF: ceo</div> <div><input type="checkbox"/> Add this Project to all new Groups</div>
Project Type:		
Created by:	meredith (meredith)	meredith (meredith)

Other Project Settings

Project Dependencies

[Modify Entry Column Dependencies](#)

[Modify Entry Column Dependencies](#)

Project Approvals

[Modify Project Approval Settings](#)

[Modify Project Approval Settings](#)

Custom Fields

Project

P1: Task 1

P1: Task 2

Project Bill Rate Type:

Hourly

Hourly

Project Bill Rate:

Figure 18.5. Project compare and modify

You can only manage Project Dependencies and Project Approval Plans from the Project Modification screen of an existing Project.

The system allows your organization to delete unused or obsolete projects under certain circumstances. A project that has never had any time, expenses, or mileage logged against it may be deleted from the database and thereby removed from use. However, if a project has ever been used as part of a time, expense, or mileage entry, the system will not allow you to delete that project. These projects should be modified to have a status of 'hidden' instead of deleted. To delete an existing project, specify the search criteria for the project on the main Project screen and click the Search button (see figure 18.1). The search results will be displayed below the criteria. From the search results on the main Project screen, select the projects that you would like to delete. Then go to the bottom of the screen and click the Delete button.

Sorting and Navigating Projects

Once you have created several projects, you can decide how to sort them on the main Project screen. You can choose to sort the visible projects by one of three methods: position within the project tree, alphabetical by project name, or alphabetical by project description. Projects are sorted alphabetically by project name by default. To change the sorting order for the screen you are currently viewing, click the column header for Tree, Project Name, or Description. The system will refresh the main Project screen and the visible projects will be sorted by the method you indicated.

In addition to the hierarchical Tree sort method, you may also use the yellow and blue arrow icons to view sections within the project hierarchy (see figure 18.1). Yellow arrows appear next to any project that has subprojects or 'child' projects underneath it. Clicking on the yellow arrow opens up a single level of the hierarchy which will show the 'descendants' underneath the selected project. If a project has more than one level of descendants (child and grandchild subprojects), a blue arrow icon will also be displayed next to the project (see figure 18.1). Clicking on the blue arrow icon displays all levels of the hierarchy below the selected project. After expanding a level, you may collapse a level by clicking the respective yellow arrow icon again.

Please note that choosing a sorting method other than the default applies to the current page view only. Leaving the main Project screen and returning later will reset your view to the default sorting method.

Batch Modification

In addition to making modifications to projects by clicking the name or using the Compare and Modify feature, you have the ability to make batch modifications at the bottom of the main Projects screen (see figure 18.1 and 18.6). Batch modification allows you to efficiently make modifications to several projects at once instead of having to load each project separately. You are able to change the Group affiliation, status, and parent of multiple projects at once. To modify existing projects using the batch modification feature, specify the search criteria for the projects on the main Project screen and click the Search button. The search results will be displayed below the criteria. From the search results, select the names of the projects you would like to edit using batch modification. Then go to the bottom of the screen and decide the type of batch modification to perform. You can assign Groups to the selected projects or change Group assignments by selecting the Groups and clicking the respective Apply button. You can change the status of the selected projects by selecting the status and clicking the respective Apply button. Finally, you can select a new parent project for the selected projects and click the respective Apply button.



Figure 18.6. Project batch modification

Project Notes

Project Notes can be managed under Management→Projects→Project Notes (see figure 18.7). Project Notes provide a way for users to record complex comments and information for specific projects. Users have the ability to apply Project Notes to specific time, expense, and mileage records in their sheets (Project Entry Notes). They can also create Project Notes from their Management tab where they can select a project and specify a note. Notes created from the main Project Notes screen are not associated with a specific time, expense or mileage record.

To create a new Project Note, go to the Create a New Project Note section in the main Project Notes screen. Select the project and specify the name for this collection of Notes. When finished, click the Create button. Then click on the Edit icon to add the first Note.

The screenshot shows the 'Project Notes' interface. At the top, there is a breadcrumb trail: Management → Projects → Project Notes. Below this is a search section with three main areas: 'Select Projects', 'Select Dates', and 'Select Users'. 'Select Projects' has radio buttons for 'All' and 'Selected', with a list showing 'P1: Task 1', 'P1: Task 2', 'Project 1', and 'root'. 'Select Dates' has an 'In Date Range' section with 'Begin' (07/22/2010) and 'End' (07/23/2010) date pickers. 'Select Users' has radio buttons for 'All' and 'Selected', with a list showing '1, punchuser', 'Accounting, Manager', 'Accounting, User 1', 'Accounting, User 2', and 'admin1'. A green 'Search' button is below these sections. Below the search button is a 'Search Results' section containing a table with the following data:

Name	Project	Creating User	Creation Time	Last Updating User	Last Update Time	Number of matching entries	Total entries
All Ticket Notes	P1: Task 1	meredith	07/22/2010 13:30	meredith	07/22/2010 13:30	1	1

Below the table is a 'Create a new Project Note' section. It has a 'Project' dropdown menu (currently showing 'P1: Task 1') and a 'New Project Note Name' text input field. A red 'Create' button is at the bottom right of this section.

Figure 18.7. Project Notes

To view existing Project Notes, specify the search criteria and click the Search button. The search results will be displayed below the criteria. To view the details of the Project Notes, click the Edit icon. This will prompt a pop-up window displaying the details of the Project Notes with a space for adding an additional note. To add a new Project Note, specify the note in the textbox at the bottom of the pop-up and click the Add Entry button. Each new Note includes that date of creation and the user who added it. You may also edit a specific Note by clicking the respective Edit icon inside the pop-up window. Similarly, you can delete a specific Note by clicking the respective Trash Can icon.

If you are an Administrator, you can delete an entire set of Project Notes from the main Project Notes screen by clicking the respective Trash Can icon.

Project Dependencies

The system uses Project Dependencies to restrict which objects can be logged against a particular Project by any given user. These objects include Tasks, Pay Types, Bill Types, Expense Codes, Sources, Currencies, Reasons, Vehicles, and Measurements. When no Project Dependencies exist for a project, it is considered 'open' and users can log entries against any item for a selected project as long that item is contained in at least one of the user's groups.

Group membership restricts users to logging entries against items that are contained in the Groups to which they belong. A user assigned to multiple Groups can combine elements from those Groups regardless of whether those objects are in the same Group. Consider a user's combination of Groups as one large Group for that user.

When logging time, expense, or mileage, the user's Group membership and a Project's Dependencies are determined behind the scenes presenting only valid choices to the user. Care must be taken when creating Groups as well as Project Dependencies. If a project is dependent upon objects that are not contained in any of an individual's groups, that user will not be able to log records to that project.

To manage Project Dependencies, you must first select the project to manage. Specify the search criteria for the project on the main Projects screen and click the Search button (see figure 18.1). The search results will be displayed below the criteria. From the search results, click the name of the project you would like to manage Dependencies for. This will direct you to the Project Modification screen where you can manage the Dependencies by clicking the 'Modify Field Value Dependencies' link in the Other Project Settings section (see figure 18.4). This will direct you to the Project Dependencies screen (see figure 18.8).

Management → Projects → Manage Projects → Modify P1: Task 1 → Entry Column Dependencies

Dependencies set the Project filters for Tasks, Pay Types, etc. that determine the valid items that will be displayed in dropdown menus on entry screens. To add an item, select it from the column on the left and click Change Dependencies.

Should new children inherit these settings?

Modify Dependencies for Project P1: Task 1

Entry Column	Not In Dependency List	In Dependency List
Activity	Clerical CorpAdmin Design/Plan Dev	Coding Debugging
Pay Type	Family Leave Holiday Jury Duty Military Duty	Regular
Bill Type	On-Call Standard Unbillable	Billable Billed Emergency
Expense Code	Airfare/Rail Car Rental Entertainment Lodging/Room	
Source	Company Customer Employee	
Currency	AU\$ CA\$ CH\$	

Figure 18.8. Project Dependencies

The Project Dependencies screen displays two columns of items. The first column contains items that are not dependent on the project. The second column contains items that are dependent on the project. Users will be able to select these items when logging time, expense, and mileage. By default, every project in the system is initially in an 'open' state and any item (Task, Pay Type, Currency, et. al.) within the database can be logged against any project, depending only on a user's Group affiliation. However, to limit what is selectable for this project, you must place the selectable items in the dependency list.

Items are moved between the two columns by clicking on them (ctrl-click or shift-click to select multiple items in a section) and then clicking the Change Dependencies button at the bottom of this screen. When the screen refreshes, you will see that items that were selected in the column on the left have moved to the column on the right.

Project Dependencies and Child Projects

You can have 'child' projects or subprojects inherit the Dependencies of 'parent' projects in two ways. The system allows Dependencies for a 'parent' project to be assigned to the project's 'child' projects manually at the time of Dependency assignment. Simply click the Change Dependencies and Apply to Children button located at the bottom of the screen.

Alternatively, when 'child' projects are being created for this project, you can automatically have the 'child' project inherit the Dependencies of this 'parent' project by applying the automatic inheritance. This can be done by selecting 'yes' to the option labeled 'Should new children inherit these settings'. However, please keep in mind that existing 'child' project will not inherit these Dependency settings unless you click the Change Dependencies and Apply to Children button.

There is no limit to how many generations 'down' a project's dependencies can be applied. Therefore, if Project 1 has 'child' projects spanning 8 additional generations, applying the Dependencies to Project 1's 'children' will result in all of those generations (including the last project generation - Project 9) inheriting Dependencies from Project 1.

A Project inherits Dependencies from its closest 'parent' that has Dependencies. Therefore, if Project 1 has Dependencies and its 'child', Project 1A, has dependencies, then Project 1A2, a child of Project 1A, will inherit dependencies from Project 1A only and the Dependencies of Project 1 will not be associated with Project 1A2.

Project Approval Plans

Project Approval Plans allow approvers within your organization to approve or reject users' submitted time, expense, and mileage entries for specific projects. This type of Project Approval Plan based on projects can be used concurrently with Sheet Approval Plans that allow assigned approvers to approve/reject entire timesheets, expense sheets, and mileage sheets. For example if a user has been assigned to a Sheet Approval Plan, his/her timesheets, expense sheets, or mileage sheets will go through that approval process. If the user logs time, expenses, or mileage to a project that has been assigned a Project Approval Plan, those entries will go through a separate project approval process. Hence it is possible to be part of two approval processes, one for the sheet and another for the project. However, keep in mind that if an approver rejects a time entry for a project, the sheet approver will be required to approve any changes. Likewise, when a sheet approver rejects a sheet, the project approver may be required to approve changes if they affect the project in question. It is possible to force rejection for all approvers on a level if a single approver on the level rejects. Please see the next paragraph for more details.

In order to implement a project approval process, a Project Approval Plan must first be created for the project. Within the Approval Plan, approvers must be assigned. When users submit their sheets containing time, expense, or mileage entries against the project, the

entries will enter the approval process and the designated approvers will have approval/rejection authority over the individual time, expense, and mileage entries related to that project. This section specifically discusses creating Project Approval Plans. For more information about actually approving project entries, see the Approvals section of this manual.

Creating and Managing Project Approval Plans

Project Approval Plans can only be created for existing projects or after a new project has been saved. Once you have created a project, go to the main Projects screen located under Management→Projects→Project Management (see figure 18.1). To create a Project Approval Plan, you must first select the project to manage. Specify the search criteria for the project on the main Project screen and click the Search button. The search results will be displayed below the criteria. From the search results, click the name of the project you would like to create an Approval Plan for. This will direct you to the Project Modification screen where you can manage an Approval Plan by clicking the 'Modify Project Approval Settings' link in the Other Project Settings section (see figure 18.4). This will direct you to the Project Approval Plans screen (see figure 18.9).

Management → Projects → Manage Projects → Modify P1: Task 1 → Approval Settings

Currently Active? Yes

Should new children inherit these settings? No

Show approvers full sheet? No

Approvers for Project: P1: Task 1

Level	Approver Login	Approver Full Name
Add New: 1	Select an Approver	Select an Approver

Backup Approvers (optional) for Project: P1: Task 1

Level	Backup Approver Login	Backup Approver Full Name
Add New: 1	Select an Approver	Select an Approver

▶ Email settings for Project "P1: Task 1"

Modify Modify and Apply to Children

[Return to: P1: Task 1](#)

Figure 18.9. Project Approval Plan Settings

The 'Currently Active' dropdown allows you to choose between 'yes' and 'no.' If you want the Approval Plan to take effect immediately, you should set this option to 'yes.' The 'no' option is provided as a way to turn off the approval plan if you should ever find a need to have that process disabled. Please note that if you turn an Approval Plan off, any records that are 'in process' at the time you disable the process will continue through to completion.

The dropdown labeled 'Should children inherit these settings' allows you to specify whether 'child' projects of this 'parent' project will inherit this Approval Plan when new 'child' projects are created. Keep in mind that this inheritance will only be applied to new 'child' projects at

the time of creation. For existing 'child' projects to inherit these properties, you must click the Modify and Apply to Children button after setting up the Approval Plan.

The dropdown labeled 'Show approvers full sheet' allows you to specify whether approvers in the Approval Plan will be allowed to see a user's full timesheet, expense sheet, or mileage sheet when he/she has logged hours, expenses, or mileage to the project. Keep in mind that users may log time, expense, and mileage to other unrelated projects. By selecting 'yes' to this dropdown, it will allow approvers to view all entries logged for the period. By selecting 'no', the system will only display to the approver entries that have been logged to this project.

Next, select the Primary Approver(s) and Backup Approver(s) for the Project Approval Plan. Selection of a Backup Approver is optional. An entry logged to the project will be directed to the Backup Approver only if the Primary Approver has not taken any action on the entry submitted for approval. The system allows you to select as many levels of Primary Approvers and Backup Approvers for each Approval Plan as you like. You may choose to select each Primary Approver by either the Username or Full Name. These dropdowns are dependent on one another, so as you select a name in one dropdown, the other will dynamically update itself. To add more approval levels to this Project Approval Plan, you must first save the Project Approval Plan by clicking the Modify button. Once saved, the screen will refresh allowing you to select an additional level of Approvers and Backup Approvers. To remove an approval level, simply check the respective Remove checkbox and click the Modify button. This will refresh the Project Approval Plan screen with the approvers having been removed.

To change the order of approvers within the Approval Plan, change the numbers in the Level text boxes to the left of each approver's name to reflect the new order of approvers. If you need to change only one approver level, you may use a decimal number to make the change.

When finished, you can click the Modify button to save changes. Alternatively, you can click the Modify and Apply to Children button if you wish for existing 'child' projects to inherit this Project Approval Plan.

Project Approval Plan Email Settings

Each Project Approval Plan has Email Settings associated with it. Email Settings is located in its own collapsible section (see figure 18.9 and 18.10). In order for Email Settings to be enabled for Project Approval Plans, you must have your mail server settings configured under Configuration→System Settings→Server and Email.

Email settings for Project "P1: Task 1"

[Journyx ProjectXecute Project Approval Text Substitution Tags Explained](#)

Enable user notification of rejection? No ▾

Subject line for user rejection notification. JournyxTags: <ufn>'s <type>sheet

Message to be sent to the user if this project is rejected. Journyx Tags: <ufn>'s <type>sheet has been REJECTED by Reason: <reason>

Enable other approver notification of rejection? No ▾

Subject line for other approver rejection notification. Journyx Tags: <ufn>'s <type>sheet

Message to send other approvers if this project is rejected. Journyx Tags: <ufn>'s <type>sheet has been REJECTED Reason: <reason>

Enable user notification of project approval? No ▾

Subject line for user approval notification. Journyx Tags: <ufn>'s <type>sheet

Message to be sent to the user when this project is approved. Journyx Tags: <ufn>'s <type>sheet has been approved.

Enable approver notification of project submit? No ▾

Subject line for approver notification. Journyx Tags: <ufn>'s <type>sheet

Message to be sent to the approver when queued for approval. Journyx Tags: <ufn>'s <type>sheet has been submitted for

Figure 18.10. Project Approval Plan Email Settings

Within the Email Settings section of Approval Plans, you can view and manage the different emails that can be sent to approvers and users who have been assigned to the Approval Plan. The various Email Settings are detailed below.

User notification of rejection

When this email notification is enabled, the system will send an email to the user if his/her project entry has been rejected by any one of the approvers in this Project Approval Plan.

Other approver notification of rejection

When this email notification is enabled, the system will send an email to all other approvers when any single approver rejects a user's submitted project entry.

User notification of project approval

When this email notification is enabled, the system will send an email to the user that the project entry has been approved.

Approver notification of project submit

When this email notification is enabled, the system will send an email to the approvers when a user submits a project entry for approval.

Approver notification of project resubmit

When this email notification is enabled, the system will send an email to the approvers when a user resubmits a project entry that had been previously rejected.

Backup approver notification

When this email notification is enabled, the system will send an email at a specified point in time after a project entry has been submitted to, but not processed by, the primary approver associated with the Project Approval Plan. The entry will be placed in the backup approver's queue a specified number of days after the period has ended if a submitted entry has not been approved or rejected by the primary approver. The default is 1 day after the end of a period, though this value can be modified.

Email Log Options

The two email log options for each Approval Plan relate directly to the email log. The email log should generally only be used if you are having difficulties with the emails for this Approval Plan. Please enable these options only if instructed to do so by Journyx support.

The Email Setting fields for subject lines and messages accept plain text, HTML tags, and a selection of 'tricky tags' that pull information directly from the system database. The available tricky tags are given below along with the system information that the 'tricky tag' will display:

Tricky Tag	System Information Displayed
<reason>	Displays the rejection reason for the submitted project entry
<prd>	Displays the period of the submitted project entry
<type>	Displays the sheet type submitted (time, expense, or mileage)
<uid>	Displays the username of the user who submitted the project entry for approval
<ufn>	Displays the full name of the user who submitted the project entry for approval
<uem>	Displays the email address of the user who submitted the project entry for approval
<uphn>	Displays the phone number of the user who submitted the project entry for approval
<rjid>	Displays the username of the approver rejecting the project entry
<rjfn>	Displays the full name of the approver rejecting the project entry
<rjem>	Displays the email address of the individual rejecting the project entry
<rjphn>	Displays the phone number of the individual rejecting the project entry
<aprid>	Displays the username of the final approver
<aprfn>	Displays the full name of the final approver
<aprem>	Displays the email address of the final approver
<aprphn>	Displays the phone number of the final approver
<baid>	Displays the username of the backup approver
<bafn>	Displays the full name of the backup approver
<baem>	Displays the email address of the backup approver

When finished, you can click the Modify button to save changes. Alternatively, you can click the Modify and Apply to Children button if you wish for existing 'child' projects to inherit this Project Approval Plan.

Clients

The Clients feature allows you to create hierarchical departments within a project that can be assigned percentage allocations. This can help you keep track of the amount of actual resources that particular organizations or departments within your company are utilizing as compared to what was allocated to those departments. Departments can also be referred to as Clients.

Clients can be managed only via the sitemap. Clients is located under Management→Projects→Clients on the sitemap. The first step in allocating percentages to Clients is to create the Clients themselves. To create a new Client, click the 'Create and Manage Clients' link on the main Clients screen (see figure 19.1). This will direct you to the Client Creation screen (see figure 19.2). You are able to create three Clients at a time. To create a new Client, specify the name, description, and parent. When finished, click the Create button. After a Client is created, you may create a new Sub-client and select the Client as the parent. This allows you to create tiers of Clients and Sub-clients.

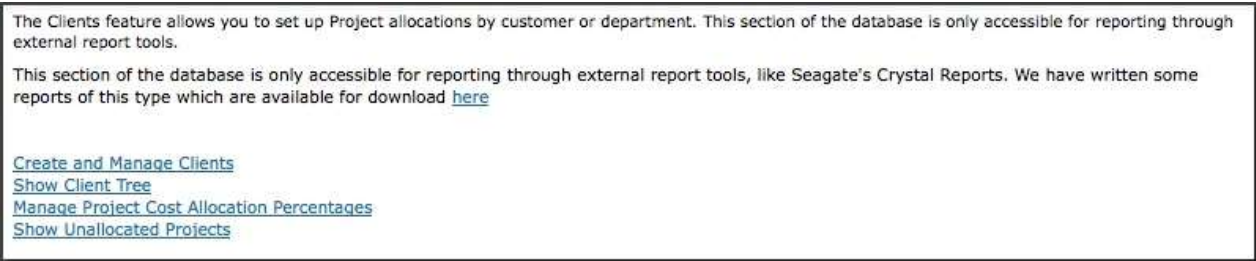


Figure 19.1. Clients and Project Allocations main page

Client Management

The Clients feature allows you to set up Project allocations by customer or department. This section of the database is only accessible for reporting through external report tools.

Delete/Modify Old Client Entries

Select	Client Name	Client Description	Parent
<input type="checkbox"/>	Client 1	Client 1 in San Francisco, CA	root
<input type="checkbox"/>	root	Default Client Parent	root

Modify

Delete

Enter New Clients

Client Name	Client Description	Parent
		root
		root
		root

Show Client Tree

Create

Figure 19.2. Client creation

After creating Clients, you can allocate percentages to the Clients. To allocate percentages, click the 'Manage Project Cost Allocation Percentages' link on the main Clients screen (see figure 19.1 and 19.3). Keep in mind that the total allocation within a node of the hierarchy must total 100%. For example, if you have 3 Clients under root and you are allocating percentages to those Clients, the sum of the allocation to the three Clients must equal 100%.

Cost Allocation Management
The Clients feature allows you to set up Project allocations by customer or department. This section of the database is only accessible for reporting through external report tools.

Delete/Modify Old Allocations

Select	Project	Client	Percentage
<input type="checkbox"/>	P1: Task 1	Client 1	100
<input type="checkbox"/>	P1: Task 2	Client 1	50

Modify

Delete

Enter New Allocations

Project	Client	Percentage
P1: Task 1	Client 1	
P1: Task 1	Client 1	
P1: Task 1	Client 1	
P1: Task 1	Client 1	
P1: Task 1	Client 1	

Show Unallocated Projects

Create

Figure 19.3. Project allocation

To view the full Client hierarchy, click the 'Show Client Tree' link on the main Clients screen (see figure 19.1). This will display the full hierarchy along with the name, description, and parent of each Client (see figure 19.4).

Client Tree
The Clients feature allows you to set up Project allocations by customer or department. This section of the database is only accessible for reporting through external report tools.

Client Tree

Name	Description	Parent
root	Default Client Parent	root
..Client 1	Client 1 in San Francisco, CA	root
....Client 1.1	Client 1.1	Client 1
....Client 1.2	Client 1.2	Client 1
..Client 2	Client 2 in Austin, TX	root

Figure 19.4. Client hierarchy

To view Clients that have not been allocated any percentages, click the 'Show Unallocated Clients' link on the main Clients screen (see figure 19.1). This will display a list of existing Clients that have not been allocated any percentages (see figure 19.5).

Unallocated Projects	
The Clients feature allows you to set up Project allocations by customer or department. This section of the database is only accessible for reporting through external report tools.	
Totally Unallocated Projects	
ProjectName	Description
1 Summary 1 (2wG28N)	None
1.1 task 1.1 (2wG28N)	None
1.2 task 1.2 (2wG28N)	None
2 Summary 2 (2wG28N)	None
2.1 task 2.1 (2wG28N)	None
2.2 task 2.2 (2wG28N)	None
Project 1	Top of Project 1
root	Default Parent Project
test_baseline (2wG28N)	Top Level Project for MS Project File: test_baseline (2wG28N)

Figure 19.5. Unallocated projects

Scheduled Projects

Management of Scheduled Projects is located under Management→Scheduled Projects→Manage Scheduled Projects.

The system allows you to create an unlimited number of scheduled project plans with assignments for users to log their time, expenses, and mileage against. The system uses a hierarchical project structure and allows unlimited levels of summary tasks and tasks under any parent/top level project. The main Scheduled Project screen serves as the master control panel for all scheduled project creation, modification, and deletion (see figure 33.1).

Scheduled Project Management is used for project plans that adhere to specific schedules and include work planned at the resource/team member level. Items managed under both Scheduled Project Management and general Project Management appear in the same hierarchical tracking column on users' time, expense and mileage entry screens, as well as the time entry panels on the My Assignments screens. The combination of these two areas into one tracking column allows users to track time for formal project task assignments, informal projects and non-project work/leave all in one timesheet or time entry area.

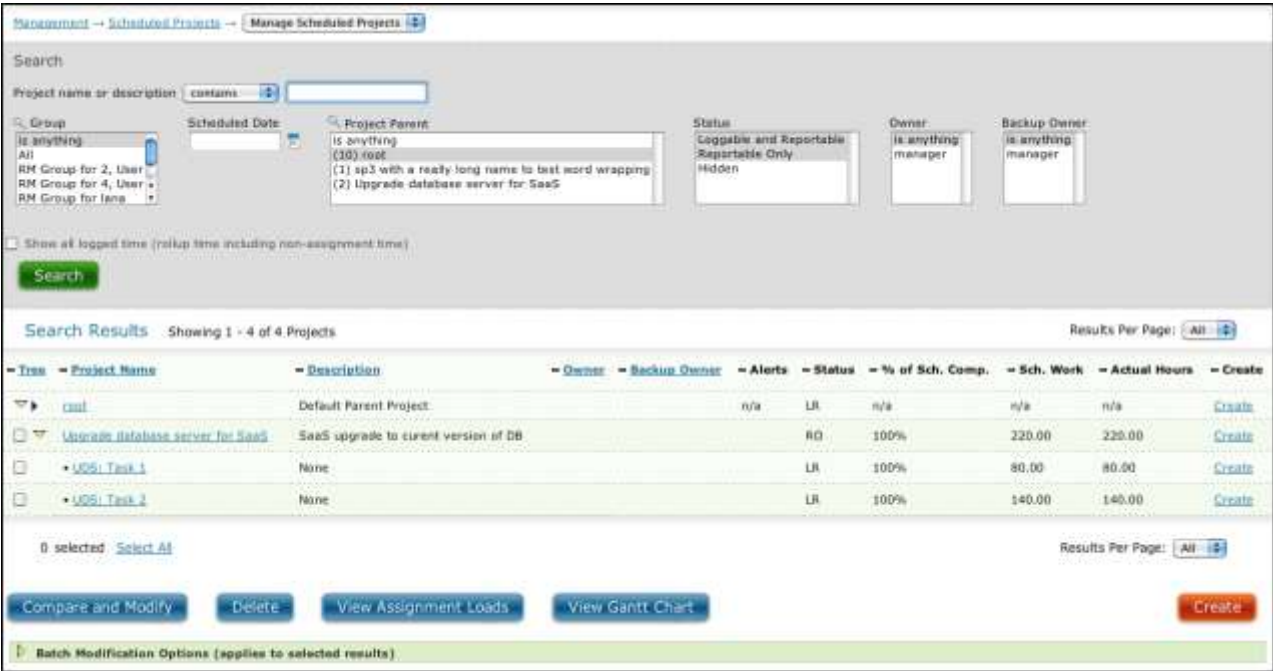


Figure 33.1.Scheduled Project Management main page

Creating Scheduled Projects

You can create a new scheduled top level project by clicking the Create button located in the lower right corner of the screen. Projects created using the button in the lower right corner are created directly under the “root” project in the hierarchy. The root project is simply the top of the project tree for hierarchical sorting, and you can rename it with a name of your choosing (e.g., All My Company’s Projects). Clicking the Create button in the lower right corner will direct you to the Project Creation screen, where you can specify the attributes of the Scheduled Project (see figure 33.2).

Copy the settings of Project: **Load**

Name:

Description:

Owner:

Children: (None)

Project Type: Reportable and assignable task

Status:

Parent:

Backup owner:

Groups:
 RM Group for Abbie Collins
 RM Group for Julie Adams
 RM Group for Mike Delgado
☐ Add this Project to all new Groups

Created by: meredith (meredith)

Alerts

Hours Status Summary

Hours and Dates

Work (Hours)

Variance: Not Available

Scheduled Work:

Baseline: Not Available

Start Date

Actual: Not Available

Scheduled Start:

Variance: Not Available

Baseline: Not Available

End Date

Actual: Not Available

Scheduled End:

Variance: Not Available

Baseline: Not Available

Duration (Days)

Actual: Not Available

Scheduled Duration:

Variance: Not Available

Baseline: Not Available

Financials

Budgeted Costs/Returns

Budgeted Cost:

Budgeted Return:

Budgeted Profit:

Budgeted ROI (%):

Other Project Settings

Custom Fields

Project Bill Rate Type:

Project State:

Figure 33.2. Project creation

Specify a name for the Scheduled Project. Although the system allows up to 252 characters for each project name, Journyx recommends short project names in order to keep the project dropdown menus on user entry screens more manageable. Enter a description for the new projects. Again, the system allows up to 252 characters for the description of each project. The description should be used to provide further details on the project. Notice that the parent project is root. Creating (summary) tasks under top level projects will be discussed later.

The Owner and Backup owner selection fields are optional. The purpose of establishing ownership is to limit project modification access, regardless of Group membership, to the owner and backup owner. If both fields are set to None, any user with group access to the project, Manager Authority and role abilities for modifying projects will be able to modify the project. If a Project Manager is designated as a project's owner, other Project Managers with group access to the project will not be able to modify the project. They will see a read-only view. The creator of the project and any system Administrators are the only ones who can set a project owner and will always be able to modify the project regardless of ownership. Project

owners can change the owner field, as well as set/change the Backup owner field. Project Managers must have access to the Scheduled Projects tab in order to be eligible for owner or backup owner status.

Quick Guide to Project Access Rights

Account Type	Projects	Read Only	Edit Access
Administrator	All projects		x
Project Creator	Projects created		x*
Project Manager/Owner	Projects in Groups		x
Project Manager/Backup Owner	Projects in Groups		x**
Project Manager/Non-Owner	Projects in Groups	x	

*Creator has edit access until a project owner is set|

**Backup owner has edit access for all project fields except the owner field.

Next, specify the status of the project: Loggable and Reportable, Reportable Only, Hidden. 'Loggable and Reportable' indicates that the project is fully active (i.e., users can log time to this project and all time logged to this project is available in reports). 'Reportable Only' indicates that the project can no longer have time logged against it, but any historical time already logged can be displayed in reports. 'Hidden' indicates that the project can neither have time/expenses logged against it or be displayed in reports.

Next, select which existing Groups should have access to the new projects. Multiple Groups may be selected by using the shift-click or ctrl-click functionality. You can always change which Groups have access to any given project later by modifying that particular Group or by modifying that specific project. Once you have selected the existing Groups that will have access, indicate whether to add this project to new Groups. If you check this option, the project will be added to every new Group that is created in the system at the time of Group creation. If you do not check this option, the newly created Group will not have access to this project by default, but can be given access at a later time by modifying that particular Group or modifying that specific project. While most organizations will add the complete project plan (top level project and all its tasks) to at least one of the primary Project Manager's groups for full access, it is optional to add the entire project plan to a group that also includes the project team members. Team members will automatically get group access to specific tasks in the project plan when they are assigned to those tasks. Adding the project plan to team member groups is only required if individuals will need access to tasks that they are not assigned to.

The Send a Notification option can be used at any time to send ad-hoc emails to the designated Owners and Assignees for projects or tasks. Ad-hoc notices can also be sent to other interested parties. If you click on the envelope icon, a separate window will be displayed for entering email addresses, a subject and body text. If the project/task has a designated Owner with an email address in the Journyx system, the Owner's email address will be populated automatically. If you select a top level project or summary task, Owners for all the tasks below it will be included. Likewise, users with email addresses in the system who are assigned to the task or any of a selected top level project's tasks will also be populated automatically. You have the option to add other email addresses manually. If you do not have a designated Owner or Assignees for a project/task, you can still send ad-hoc notices by entering email addresses manually. You will see a red warning message when you open the notification window telling you that there are no Owners or Assignees, but you may still send the notice manually. Your system administrator must have Server and Email System Settings configured in order to use this feature.

The Alerts and Hours Status Summary sections will be blank at the time of creation. When the project plan has been entered and data is being tracked, these sections will contain project status data. The Project Type field indicates if it's a "Reportable first level project" (also called a "top level project", schedule data is rolled up from the tasks underneath them and cannot have assignments), a "Summary" (cannot have assignments) or a "Reportable and assignable task" (task that is assigned to users). If you add a task underneath a reportable and assignable task, the original task becomes a first level project or summary and any existing assignments and schedule data will be transferred to the new reportable and assignable task. Task and assignment alerts are displayed based on your Resource Management alert settings under Configuration→System Settings→Projects. In the event that users have requested estimate changes to their assignments, you will see an alert in this section, as well as checkboxes in the Hours Status Summary section for adding/subtracting the changes to/from the users' assignments or a pool of unassigned hours for the task. In the event multiple users have requested changes for a single task, you will have line items for making adjustments individually or acting on them as a group.

The Hours Status Summary also contains status bar graphs for comparison. The top graph shows actual hours logged against the task. The second graph shows user estimated work remaining, which will show variances from the assignment and task scheduled work when there are user requested changes that haven't been worked into the schedule. The third graph shows assignment scheduled work, which will show variances from the task scheduled work when the task has not been fully assigned. The last graph shows the total task scheduled work. All the bar graphs are shown in hours.

Next, fill in your estimated work hours and dates for the project, unless you plan to break the project into tasks and have the total scheduled work and dates roll up from the tasks underneath it. If you don't plan to break out the top level project further, you can create a single level project plan and make assignments. For a single level project plan, you will fill in your work and dates on this screen. You can also fill in work and dates if you plan to use the project as a placeholder for the time being. When you break it into tasks at a later date, the work and dates will be recalculated to roll up from the tasks underneath the project. Scheduled Work is entered in number of hours with up to 2 decimal places. Dates are entered in the short date format configured for your system. Duration is automatically calculated based on Scheduled Start and End Dates and always includes the total number of calendar days between two dates.

Next, fill in your Financials if you want to compare your anticipated budget and costs to your actual costs and billing. Reports assume that Projected Cost, Return and Profit are in a currency denomination, and Projected ROI is a percentage.

When finished specifying the primary attributes, you may optionally configure the Custom Fields for the project. Project Dependencies and Approvals cannot be set up until after the project has been saved the first time. See the Project Dependencies or Project Approval Plans sections of this manual for more information.

There are also some checkbox settings specific to Scheduled Projects under Save Options at the foot of the screen. The first two options allow you to set the baseline values for a single task or the entire project. When you select the first option for a top level project, the second option becomes available for applying the baseline to the entire project plan. You can reset the baseline for a project or task at any time. The last setting under Save Options allows you to set individual tasks, portions of a project plan or an entire project plan to complete status automatically. This setting is useful when tasks are completed using less work/hours than was

anticipated. When finished, click the Save button. To create another project, click the Save and New button.

Alternatively, on the Project Creation screen you can copy the settings of another project by searching for and selecting a project and then clicking the Load button located at the top right corner (see figure 33.3). This will pre-populate that project's settings (with the exception of MS Project and QuickBooks Custom Fields, Dependencies, Project Approval Plans and Baseline values) which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new project. When finished selecting and specifying attributes for the new project, you can simply click the Save button.



Figure 33.3. Copy another project

You can also set up your scheduled project plans using imports or Journyx Projectlink, the integration for MS Project. For more information about setting up projects by importing them, see the Imports section of this manual or the separate user manual for Journyx Projectlink

Breaking Scheduled Projects Into Tasks/Summary Tasks

The system allows you to create projects under the root project as well as under other projects. Creating tasks/summary tasks under scheduled projects can be done from the main Scheduled Projects screen. To create a task/summary task under a project, click the respective 'Create' link in the last column of the parent project row in search results (see figure 33.1). This will direct you to the Project Creation screen, where you can specify the attributes of the task/summary task (see figure 33.3.1). Notice that the parent is the project that you selected from the search results. Like top level projects, scheduled work and date values will be rolled up from the tasks if you are creating a summary task. For a task that will be assigned to users, filling in the scheduled work and dates will allow you to assign the task to users based on schedule availability. Project Dependencies and Approvals cannot be set up until after the project has been saved the first time. See the Project Dependencies or Project Approval Plans sections of this manual for more information. When finished entering the primary attributes and Custom Field values, click the Save button. To create another task, click the Save and New button.

Copy the settings of Project:

Name:

Description:

Owner:

Children: (None)

Project Type: Reportable and assignable task

Status:

Parent:

Backup owner:

Groups:
 RM Group for Abbie Collins
 RM Group for Julie Adams
 RM Group for Mike Delgado
☐ Add this Project to all new Groups

Created by: meredith (meredith)

Alerts

Hours Status Summary

Hours and Dates

Work (Hours)

Variance: Not Available

Scheduled Work:

Baseline: Not Available

Start Date

Actual: Not Available

Scheduled Start:

Variance: Not Available

Baseline: Not Available

End Date

Actual: Not Available

Scheduled End:

Variance: Not Available

Baseline: Not Available

Duration (Days)

Actual: Not Available

Scheduled Duration:

Variance: Not Available

Baseline: Not Available

Financials

Budgeted Costs/Returns

Budgeted Cost:

Budgeted Return:

Budgeted Profit:

Budgeted ROI (%):

Other Project Settings

Custom Fields

Project Bill Rate Type:

Project State:

Figure 33.3.1.Task/summary task creation

Alternatively, on the Project Creation screen you can copy the settings of another project by searching for and selecting a project and then clicking the Load button located at the top right corner (see figure 33.3). This will pre-populate that project's settings (with the exception of MS Project and QuickBooks Custom Fields, Dependencies, and Project Approval Plans) which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new project. When finished selecting and specifying attributes for the new project, you can simply click the Save button.

Modifying and Deleting an Existing Project

To modify an existing project, specify the search criteria for the project on the main Scheduled Project screen and click the Search button (see figure 33.1). If your Journyx Administrator has set up your system to display the Actual Hours field in search results, you will also see a checkbox option in the search panel to show all logged time. By default, the Actual Hours field will only show time if: 1. It was logged by someone explicitly assigned to

the scheduled project/task, and 2. "Rollup" data processing has added the time to the task actual work.

For the first condition, it is possible to give someone access to a task without assigning them to it. This is done using Journyx Groups. Scheduled project actual work will not reflect time that was logged by an unassigned user. The best way to avoid this situation is to ensure that no one but the project manager has access to these tasks in any of their Journyx groups. If an unassigned user does get access and logs time, you can add an assignment later to ensure the time is counted against the actual work for the scheduled project. The "Show all logged time" checkbox can help you find these discrepancies when actual hours vary from one view to other.

For the second condition, you may need to wait for rollup processing to complete before you see actual hours that were very recently added to the system. Rollup processing checks for changes to scheduled and actual work approximately every 30 minutes and updates the scheduled project totals. This periodic processing allows the scheduled project management screen and other related reports to load more quickly because the calculations are not occurring as the screens load. Again, the "Show all time logged" setting will allow you to see time that has been entered but not added to the rollup data. If you are unsure if there are new records that need to be added to rollup data, you can run rollup data manually if you are logged in as an Administrator. Rollup data is also subject to an editable look back period, so rollup data only looks back for so many days to add changes. If you are making changes to scheduled and actual work that are more than a month in the past, you may need to adjust the look back period briefly and run the rollup data process to get those records entered in the past. See the System Settings section of this manual for more information on manually running the rollup data process.

In addition to the standard search results view, you can also view a scheduled project in a Gantt Chart by selecting the project from the search results and clicking on the View Gantt Chart button below the results. You must select a project to view. The project parent and descendants are automatically included when you select a single project. The Gantt Chart view includes options to change the sorting and display of the scheduled project data, but it does not currently offer any edit capabilities. To edit any of the scheduled project information, you will need to return to the search results view by going to Management-->Scheduled Projects. Edit capability in the Gantt Chart view may be added to a future release.

The search results will be displayed below the criteria. From the search results, click the name of the project you would like to modify. This will direct you to the Project Modification screen where you can modify the attributes of the project (see figure 33.4).

Alternatively, you have the ability to compare and modify multiple projects at the same time. From the search results on the main Project screen, check the checkboxes of the projects that you would like to manage at once (see figure 33.1). Then go to the bottom of the screen and click the Compare and Modify button. This will take you to a Project Modification screen that contains the attributes of the selected projects side by side (see figure 33.5).

Name:

5 - Port server to production (ADB)

Description:

Owner:

None

☐ Update all descendants with owner changes

Children:

5 - Port server to production (ADB) has 0 Tasks directly under it.
[Create a new child Task](#)

Status:

Loggable and Reportable

Parent:

[Add Database Server to SaaS](#)

Backup owner:

None

Groups:

Group 1

RM Group for Abbie Collins

RM Group for Julie Adams

RM Group for Mike Delgado

☐ Add this Project to all new Groups

Project Type:

Reportable and assignable task

Created by:

meredith (meredith)

Alerts

Assignment alerts:

[View 1 assignment with 0 alert](#)

Task Alerts:

No alerts and no warnings.

Hours Status Summary

Hours summary:

Actual:

4.00h

User estimated work remaining:

0.00h

Assignment scheduled:

4.00h

Task scheduled:

4.00h

User estimated hours:

There are no outstanding change requests from team members for the current schedule.

Hours and Dates

Work (Hours)

Variance:

Not Available

Scheduled Work:

4.00

0.00

unassigned hours

Baseline:

Not Available

Start Date

Actual:

07/13/2010

Variance:

Not Available

Scheduled Start:

07/14/2010

Baseline:

Not Available

Date

Figure 33.4.Project modification

Journyx

168

Name:	2 - Initiate beta testing (EnP)	3 - Monitor beta testing (EnP)
Status:	Loggable and Reportable	Loggable and Reportable
Description:		
Parent:	Enterprise Portal Launch	Enterprise Portal Launch
Owner:	None	None
	<input type="checkbox"/> Update all descendants with owner changes	<input type="checkbox"/> Update all descendants with owner changes
Backup owner:	None	None
Children:	2 - Initiate beta testing (EnP) has 0 Tasks directly under it.	3 - Monitor beta testing (EnP) has 0 Tasks directly under it.
	Create a new child Task	Create a new child Task
Groups:	<div>Group 1</div> <div>RM Group for Abbie Collins</div> <div>RM Group for Julie Adams</div> <div>RM Group for Mike Delgado</div> <input type="checkbox"/> Add this Project to all new Groups	<div>Group 1</div> <div>RM Group for Abbie Collins</div> <div>RM Group for Julie Adams</div> <div>RM Group for Mike Delgado</div> <input type="checkbox"/> Add this Project to all new Groups
Project Type:	Reportable and assignable task	Reportable and assignable task
Created by:	meredith (meredith)	meredith (meredith)

Alerts

Task Alerts: No alerts and no warnings. [View 2 assignments with 2 alerts](#)

Assignment alerts:

Julie Adams has 1 alert.

No actual work entered for the last 4 days.

Abbie Collins has 1 alert.

No actual work entered for the last 4 days.

Hours Status Summary

Hours and Dates

Work (Hours)		
Scheduled Work:	24.00	32.00
	0.00 unassigned hours	0.00 unassigned hours
Variance:	Not Available	Not Available
Baseline:	Not Available	Not Available
Start Date		

Figure 33.5. Project compare and modify

You can only manage Project Dependencies and Project Approval Plans from the Project Modification screen of an existing project.

The system allows your organization to delete unused or obsolete projects under certain circumstances. A project that has never had any time, expenses, or mileage logged against it may be deleted from the database and thereby removed from use. However, if a project has ever been used as part of a time, expense, or mileage entry, the system will not allow you to delete that project. These projects should be modified to have a status of 'hidden' instead of deleted. You also cannot delete a parent project/summary task that has tasks/summary tasks underneath it. In order to delete the parent project, you must first delete everything underneath it in the hierarchy. To delete an existing project, specify the search criteria for the project on the main Scheduled Project screen and click the Search button (see figure 33.1). The search results will be displayed below the criteria. From the search results on the main Scheduled Project screen, select the projects that you would like to delete. Then go to the bottom of the screen and click the Delete button.

Sorting Scheduled Projects

Once you have created several projects, you can decide how to sort them on the main Scheduled Project screen. You can choose to sort the visible projects by one of three methods: position within the project tree, alphabetical by project name, or alphabetical by project description. Projects are sorted hierarchically by default. To change the sorting order for the screen you are currently viewing, click the column header for Tree, Project Name, or Description. The system will refresh the main Scheduled Project screen and the visible projects will be sorted by the method you indicated.

In addition to the hierarchical Tree sort method, you may also use the yellow and blue arrow icons to view sections within the project hierarchy (see figure 33.1). Yellow arrows appear next to any project that has tasks/summary tasks underneath it. Clicking on the yellow arrow opens up a single level of the hierarchy which will show the 'descendants' underneath the selected project. If a project has more than one level of descendants (summary tasks and tasks), a blue arrow icon will also be displayed next to the project (see figure 33.1). Clicking on the blue arrow icon displays all levels of the hierarchy below the selected project. After expanding a level, you may collapse a level by clicking the respective yellow arrow icon again.

Please note that choosing a sorting method other than the default applies to the current page view only. Leaving the main Scheduled Project screen and returning later will reset your view to the default sorting method.

Batch Modification

In addition to making modifications to projects by clicking the name or using the Compare and Modify feature, you have the ability to make batch modifications at the bottom of the main Scheduled Projects screen (see figure 33.1 and 33.6). Batch modification allows you to efficiently make modifications to several projects at once instead of having to load each project separately. You are able to change the Group affiliation, status, and parent of multiple projects at once. To modify existing projects using the batch modification feature, specify the search criteria for the projects on the main Scheduled Projects screen and click the Search button. The search results will be displayed below the criteria. From the search results, select the names of the projects you would like to edit using batch modification. Then go to the bottom of the screen and decide the type of batch modification to perform. You can assign Groups to the selected projects or change Group assignments by selecting the Groups and clicking the respective Apply button. You can change the status of the selected projects by selecting the status and clicking the respective Apply button.

Batch Modification Options (applies to selected results)

Assign to Group(s)

Group 1
RM Group for Abbie Collins
RM Group for Julie Adams
RM Group for Mike Delgado

☐ Remove current Group assignments.

Apply

Change Status

Loggable and Reportable
Reportable Only
Hidden

Apply

Figure 33.6. Project batch modification

Assignments

Management of Assignments is accessed under Management→Scheduled Projects→Scheduled Project Management. To create or view assignments you can either select a scheduled project(s) and click on the View Assignment Loads button on Scheduled Project Management, or you can create/edit a scheduled project and click on the Save and View Assignments button when you have finished making changes to the project/task.

An assignment is simply the relationship between a task and a user with a designated number of scheduled work hours and start and end dates. Each assignment consists of a single task and a single user, but an unlimited number of assignments can be created for a single task. When a task is fully assigned (all task scheduled hours have been assigned to at least one user), the task scheduled work and date values will reflect the sum of the assignment values for the same (task will reflect the sum of assignment scheduled work, the earliest assignment start date and the latest assignment end date).

The screens for managing assignments include more than a simple interface for entering assignment values. They also include features for locating resources, checking their availability for specific assignments and forecasting how the assignments would affect selected users' current schedules. The assignment screens provide a wizard approach with an initial screen for viewing or manipulating existing assignments for a task, and a second screen for creating or reassigning assignments (see figures 36.1 and 36.2).

The screenshot shows the 'Assignment status for a selected task(s)' interface. At the top, a breadcrumb trail reads: Management → Scheduled Projects → Manage Scheduled Projects → Assignments. Below this is a descriptive paragraph and two buttons: 'Back' and 'Next'.

The main interface is divided into two primary sections:

- Selected Assignment Details:** A form on the left with fields for:
 - Task: 4.1 - Draft new collateral (EnP)
 - Assigned to: Not assigned
 - Hours: 80.00
 - Start date: 07/12/2010
 - End date: 07/28/2010
 - Duration: 17.00
 Below these fields are three buttons: 'Save', 'Save and Modify Task', and 'Delete Unassigned Hours'.
- Task Assignments:** A table on the right showing 'Showing 1 of 1 Results'. The table has columns: Task, Assignments, Sch. Task Work, Assigned Task Work, and Duration.

Task	Assignments	Sch. Task Work	Assigned Task Work	Duration
4.1 - Draft new collateral (En...	80.00 hours are unassigned	80.00	0.00	17.00

 Below the table is another 'Results Per Page' dropdown set to 5 and a 'Go' button.
- Assigned Users:** A section at the bottom with the instruction 'Select an assignment to view the assigned users.' and an empty selection box.

Figure 36.1. Assignment status for a selected task(s)

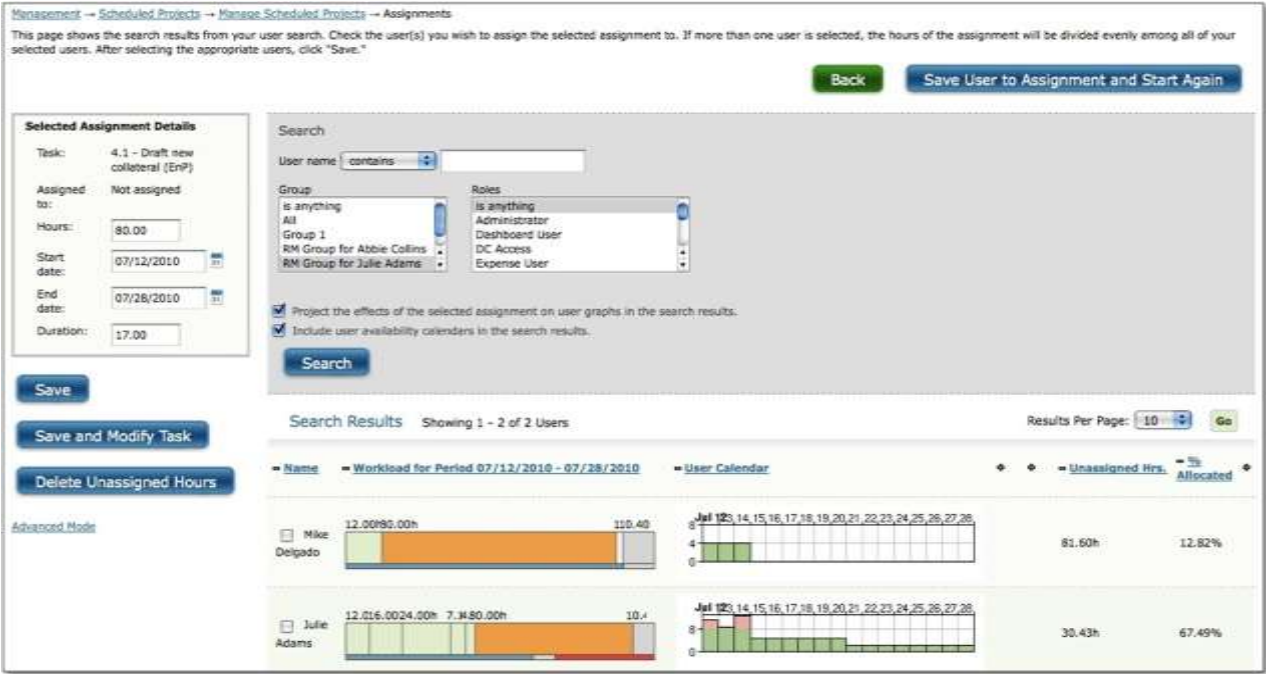


Figure 36.2.Assignment creation/reassignment for a selected task/assignment

Creating Assignments

You can create assignments for any scheduled project that is an "assignable task". Assignable tasks must be at the lowest level of a project tree - in other words, an assignable task has no additional tasks underneath it in the hierarchy. You can create a new assignment by either selecting a task on the Scheduled Project Management screen and clicking on the View Assignment Loads button or clicking on the Save and View Assignments button on the scheduled project/task creation screen.

Both buttons will direct you to the Assignments screens, where you can specify the attributes of the assignment and assign it to a user (see figures 36.1 and 36.2).

If you selected a task that has no existing assignments (all scheduled work hours are still unassigned), the unassigned hours will be selected automatically in the Task Assignments bar graph. The color orange indicates which portion of the bar graph is selected (see figure 36.3).

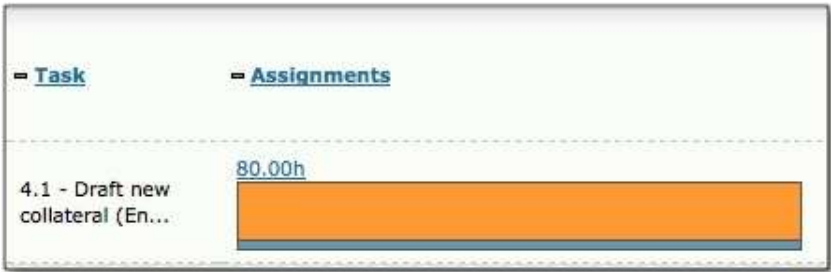


Figure 36.3.Unassigned hours for a new task selected

Also on this screen are:

- **Selected Assignment Details** - In the box in the upper left corner are the assignment (or task in the event there are no assignments) details, including the associated task name, name of the assignee if any, scheduled work hours, scheduled start date, scheduled end date and duration. You will manipulate the values in this box when breaking up a task into more than one assignment or making changes to existing assignments.
- **Tasks Panel** - The tasks panel allows you to review and manage all the assignments for a task. The details shown in the Selected Assignment Details box and the columns in the task panel are dependent on the task assignment that is selected in the task panel. Individual assignments are selected in the bar graphs and show up as orange blocks of color when selected. If a new task has no assignments, the total unassigned hours will be selected in orange automatically, and the assignment detail values will be identical to the task values. The Sch. Start, Sch. End and Duration columns are derived from the selected assignment, unless there are no assignments in which case they come from the task. The Sch. Task Work column is always derived from the task scheduled work field. The Assigned Task Work column indicates how much of the scheduled task work has been assigned to users or "planned". This field is 0 when no assignments exist. The Alerts column shows any planning or status problems associated with existing assignments.
- **Assigned Users Panel** - The assigned users panel shows user schedules for any users who are already assigned to a selected task. In addition to the bar graph which shows how the user's time is scheduled along with any related over allocation problems, Schedulable Hours, Assigned Hours and Schedulable Days columns are shown for the selected period. The "schedulable" fields show how much total time the user has available for project work during the selected period, regardless of current assignments. Assigned Hours shows how much of the schedulable time has been taken up with assignments for project work. The User Alerts for This Task column shows any planning or status problems for the user's task assignment.
- **Next Button** - The next button directs you to the screen where you can assign users to unassigned work or swap out users for an existing assignment.

After you have verified that the selected unassigned work for the task is showing the details you entered on the task creation screen, you can click on the Next button in the upper right corner to proceed to user assignment. The screen that is displayed next continues to show the Selected Assignment Details in the upper left corner. These details indicate what you will be assigning to a selected user or splitting between more than one user.

On this screen you can search for users to assign to tasks using any of the standard user search parameters.. These include by user name, assignments to other Projects/Tasks, Groups, Roles or any custom user field that includes select list options. As a result, you can set up your own attributes for use when searching for the appropriate users to assign to a specific task.

After you have selected your search parameters for filtering your user list, click on the Search button to view your search results and the users' availability for the period of the selected assignment. You can choose to show the "what if" scenario which shows how assigning the selected assignment to users in the search results would affect their availability by checking the "Project the effects of the selected assignment on user graphs in the search results." option before clicking on the Search button. When this option is checked, the potential

assignment appears as an orange block in the user graphs (see figure 36.4). You also have the option to include user calendar availability graphs in the search results.

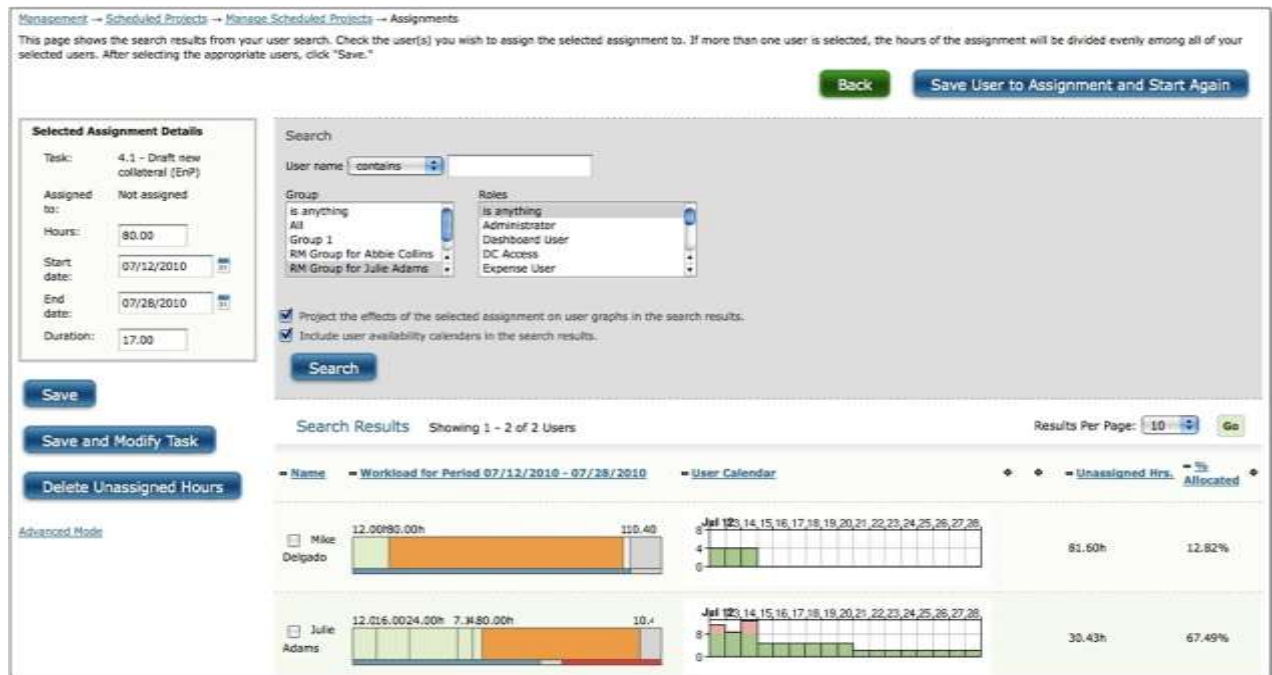


Figure 36.4. Search results with potential assignment shown in user graphs

Assigning a Single User to Unassigned Time

To assign a single user to all of the unassigned work for the selected task, simply select the checkbox next to the user in the search results and click on any of the Save buttons located on the screen. The Save button under the Selected Assignment Details box and the Save User to Assignment and Start Again button at the top and bottom of search results will both save your assignment and return you to the initial Assignments screen where you can review the results of your selection. The Save and Modify Task button will return you to the task modification screen under Scheduled Project Management where you can review the effects of your assignments on the task as a whole.

Splitting Unassigned Time Evenly Between Users

To split up a task's unassigned work evenly between 2 (or more) users, simply leave the assignment values as they are and select the users that you want to assign. When you click on any of the save options, the unassigned work will be split evenly into assignments for each of the selected users. For example, if you select 3 users for a task with unassigned work of 9 hours, 3 assignments will be created (1 for each user) with 3 hours of work for each of them. Any time you select more than 1 user for a block of unassigned time or as replacements for a user assigned to an existing assignment, the Hours value displayed in the Selected Assignment Details box will be split evenly into assignments for the selected users.

Splitting Unassigned Time Unevenly Between Users

To split up a task's unassigned work into unequal assignments for more than 1 user, you must adjust the Hours value in the Selected Assignment Details box and make the

assignments one at a time. For example, you have a task with 8 hours of work that you want to assign to 2 users. You want User 1 to be assigned for 2 hours of work and User 2 for 6 hours. To do this, you would set the Hours field in the Selected Assignment Details box to 2, select User 1 and click on Save. Then you select the remaining unassigned work from the Task Assignments bar graph and click on the Next button. The second time you don't have to change the Hours field in the Selected Assignment Details box because 6 hours is all that remains. Run your user search, select User 2 and click on Save. You will return to the task assignments overview where you can see that User 1 is assigned for 2 hours and User 2 for 6 hours.

Editing Assignments

You use the same screens for editing assignments that you used to create them. You can edit an assignment by either selecting a task on the Scheduled Project Management screen and clicking on the View Assignment Loads button or clicking on the Save and View Assignments button on the scheduled project/task modification screen.

Both buttons will direct you to the Assignments screens, where you can edit the attributes of the assignment or reassign it to a different user or users (see figures 36.1 and 36.2).

If you selected multiple tasks or a task with multiple assignments, you will need to choose a specific assignment to edit on the Assignments screen. To select an assignment for editing, click on the specific block of the Task Assignments bar graph that corresponds to the assignment. You can mouse over each block to see more details. Once you have clicked on a block, the color orange indicates which portion of the bar graph is selected (see figure 36.5).

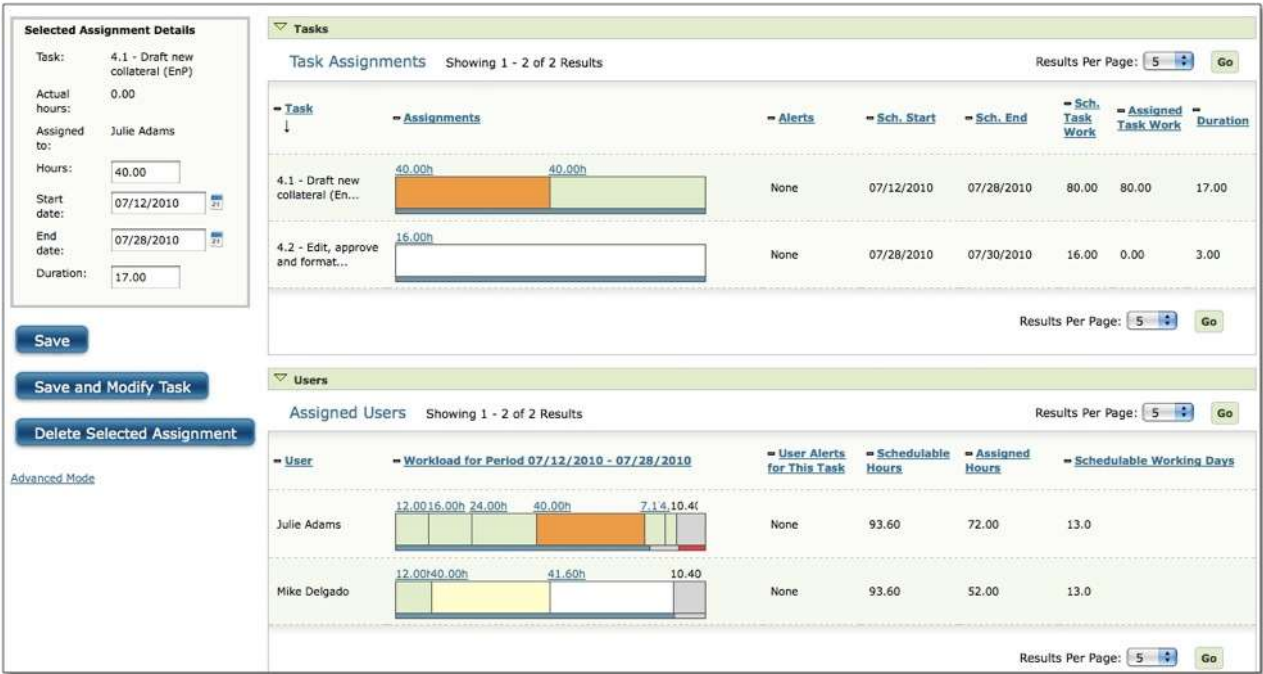


Figure 36.5.A specific assignment is selected for editing

Also on this screen are:

- **Selected Assignment Details** - In the box in the upper left corner are the assignment (or task in the event there are no assignments) details, including the associated task name, name of the assignee if any, scheduled work hours, scheduled start date, scheduled end date and duration. You will manipulate the values in this box when breaking up a single assignment into more than one assignment or making other schedule changes to existing assignments.
- **Tasks Panel** - The tasks panel allows you to review and manage all the assignments for a task. The details shown in the Selected Assignment Details box and the columns in the task panel are dependent on the task assignment that is selected in the task panel. Individual assignments are selected in the bar graphs and show up as orange blocks of color when selected. The Sch. Start, Sch. End and Duration columns are derived from the selected assignment. The Sch. Task Work column is always derived from the task scheduled work field. The Assigned Task Work column indicates how much of the scheduled task work has been assigned to users or "planned". The Alerts column shows any planning or status problems associated with existing assignments.
- **Assigned Users Panel** - The assigned users panel shows user schedules for any users who are already assigned to a selected task. In addition to the bar graph which shows how the user's time is scheduled along with any related over allocation problems, Schedulable Hours, Assigned Hours and Schedulable Days columns are shown for the selected period. The "schedulable" fields show how much total time the user has available for project work during the selected period, regardless of current assignments. Assigned Hours shows how much of the schedulable time has been taken up with assignments for project work. The User Alerts for This Task column shows any planning or status problems for the user's task assignment.
- **Next Button** - The next button directs you to the screen where you can assign users to unassigned work or swap out users for an existing assignment.

After you have verified that the details displayed match the selected assignment, you can go to the Selected Assignment Details box to make schedule adjustments to the assignment. When you have finished making schedule changes, you can click on Save to review the effects of those changes. You also have the option of removing the assignment from the current user by clicking on the Delete Selected Assignment button. This will return the deleted assignment hours to the unassigned work bucket for the task. You can then come back later and assign those hours to someone else in the same way you created the original assignment, or you can go on to delete the unassigned hours by clicking on the Delete Unassigned Hours button. Deleting the unassigned hours reduces the scheduled work for the task by the same amount and leaves the task work fully assigned or planned.

If you need to swap out users or add users to an assignment, you can click on the Next button in the upper right corner to proceed to user assignment. The screen that is displayed next continues to show the Selected Assignment Details in the upper left corner. These details indicate what you will be reassigning to a selected user or splitting between the current assignee and another user or users.

On this screen you can search for users to assign to tasks using any of the standard user search parameters.. These include by user name, assignments to other Projects/Tasks, Groups, Roles or any custom user field that includes select list options. As a result, you can set up your own attributes for use when searching for the appropriate users to assign to a specific task.

After you have selected your search parameters for filtering your user list, click on the Search button to view your search results and the users' availability for the period of the selected

assignment. You can also choose to show the "what if" scenario which shows how assigning the selected assignment to users in the search results would affect their availability by checking the "Project the effects of the selected assignment on user graphs in the search results." option before clicking on the Search button. When this option is checked, the potential assignment appears as an orange block in the user graphs (see figure 36.4).
Reassigning an Assignment to a New User

When you select a user from the search results to add to an assignment that already has another user assigned to it, the original user will always be removed in favor of the new user. Therefore, all you need to do to swap out users on an existing assignment is select the checkbox next to the new user and click on any of the Save buttons located on the screen. The Save button under the Selected Assignment Details box and the Save User to Assignment and Start Again button at the top and bottom of search results will both save your assignment changes and return you to the initial Assignments screen where you can review the results of your selection. You will see that the original assignment was reassigned to the new user. The Save and Modify Task button will return you to the task modification screen under Scheduled Project Management where you can review the effects of your assignments on the task as a whole.

Adding More Users to an Existing Assignment

In the event that you need to add users to an existing assignment to assist those who are already working on the task, you can select more than one user from the search results to save to an existing assignment. Technically you will be removing the originally assigned user and splitting up the unassigned time between new users. As a result, you must select the currently assigned user along with any users you want to add in order to split the assignment between the original assignee and new users. If you are splitting the assignment up evenly between users, you can select your users at the same time and click on Save. If you are splitting up the time unevenly, you must make the assignments in multiple steps. See the sections on splitting assignments up evenly and unevenly under Creating Assignments for detailed instructions.

User Workload Bar Graphs

Bar graphs displayed in the assigned users panel and user search results on the Assignments screens provide a visual means for comparing user availability for a given task or assignment period. These graphs allow you to determine who has time available or will have to work the least amount of overtime to complete a proposed assignment. In addition to showing the results of a new assignment on a user's schedule, the Assignments screens also allow you to project a potential assignment on to user schedules for review before making an assignment.

The different color blocks that make up the bar graphs represent different types of time scheduled (see figure 36.6):

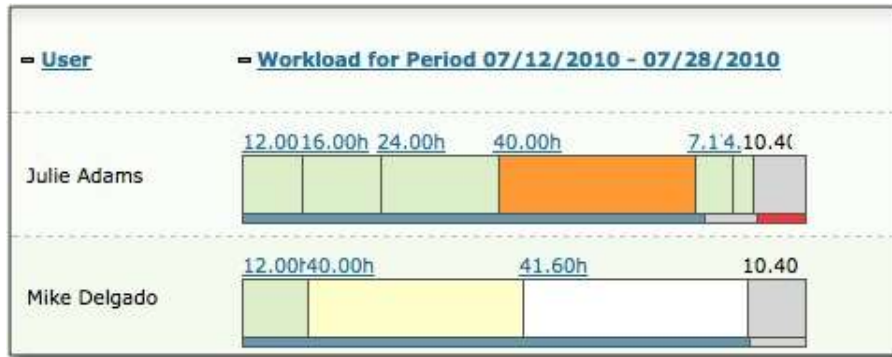


Figure 36.6. User Workload Bar Graph

- White always represents unassigned time/time available for project assignment. Comparing user bar graphs allows you to quickly locate users with the most time available by scanning for the largest blocks of white.
- Green or Yellow represents time assigned to projects/tasks. Green blocks indicate different project assignments. Mousing over each block provides more details on the project/task assignment. An assigned block will show up in yellow in the event that you have another user's assignment for the same task selected on the screen.
- Gray represents overhead time. Approved leave time, holiday time and the system wide overhead percentage amount (if any) are all reflected in the overhead time block. Likewise, the Schedulable Hours and Schedulable Working Days fields in the user search results are adjusted for the various components of overhead time. All users start with a base work day of 8 hours and a base work week of 5 days prior to overhead adjustments.
- Orange represents a block that is either selected on the initial Assignments screen or a projected potential assignment in the search results on the second Assignments screen.<
- Blue represents the total number of assigned and unassigned hours the user has available for the period based on the base work day and work week. It does not include overhead hours for the period, which are still shown in gray.
- Red represents the amount of overtime hours a user would have to work above and beyond the base schedule plus overhead time in order to complete the current assignment load on time. Just as comparing white blocks can help you to determine which users have the most time available, red blocks allow you to quickly scan for which users have the least time available.

User Calendar Availability Graphs

Availability Calendar graphs displayed in the user search results provide a visual means for finding specific periods of full or partial availability. These graphs allow you to determine on what dates a user has time available for project work - and how much time is available on a given day.

The number scale on the left side of the bar shows the number of hours with the green bar height determining how many hours are assigned on a specific date. The numbers across the top of the bar represent the dates included in the period you defined when setting search parameters. The green bar shows project assignment time. The gray bar shows holiday or leave time that makes the user unavailable (see figure 37.3). Hovering over any of the bars provides detailed information on how much time is blocked off.

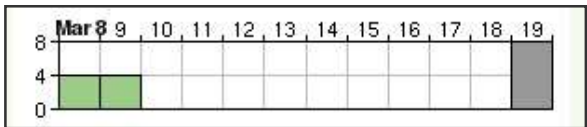


Figure 36.7. User Availability Calendar

Resource Availability

Resource Availability is located under Management→Scheduled Projects→Resource Availability

Resource Availability allows you to review user schedules for a selected period and compare users based on available time. Resource Availability includes a date range selection option, user search and user search results with bar graphs showing scheduled time using various blocks of color to represent types of scheduled time (see figures 37.1).

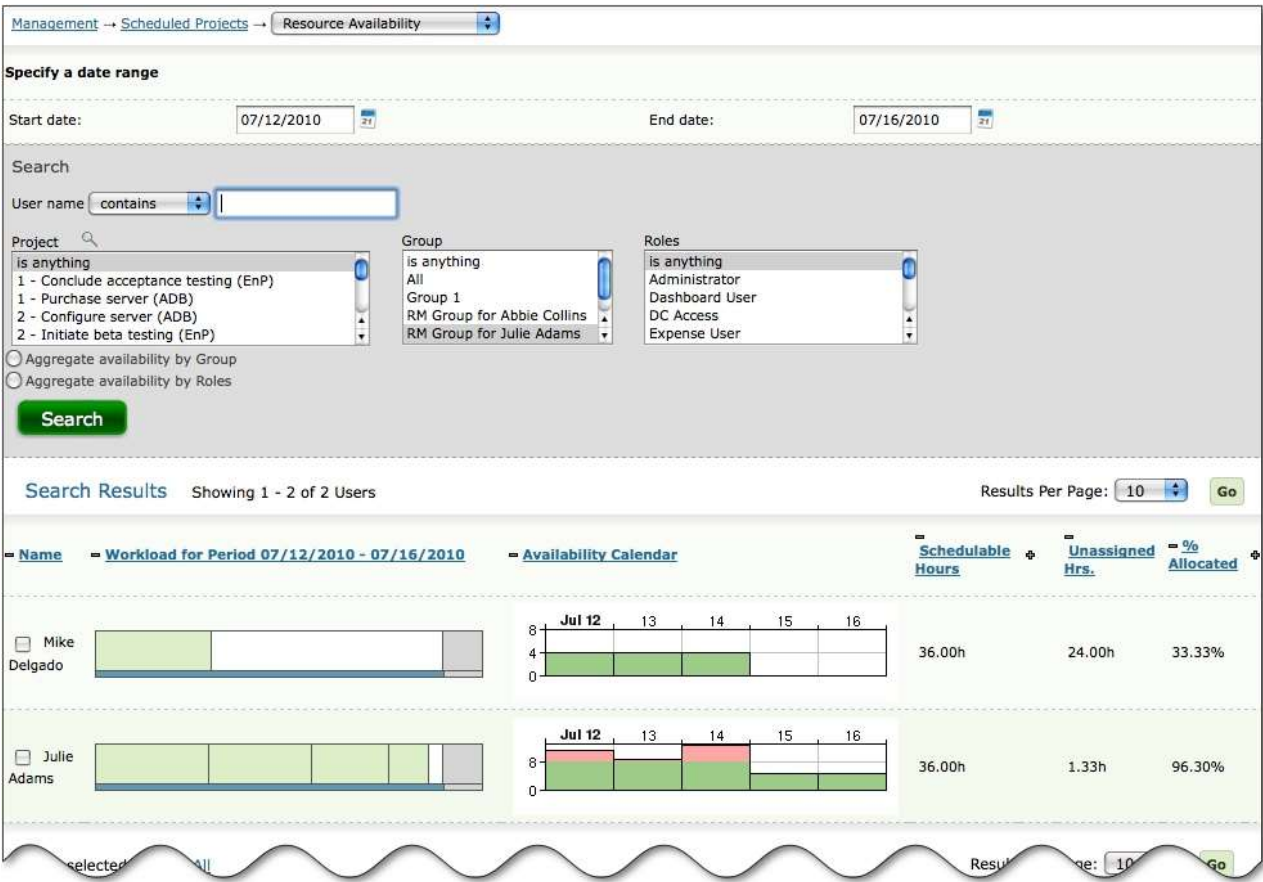


Figure 37.1. Resource availability search results for a selected period

In order to review schedules and availability for a selected period and selected users, you must first choose a date range. You can either enter the start and end dates manually, or you can select them from the pop up calendars by clicking on the calendar icons.

Next you must choose your search parameters for filtering your user list. These include by user name, assignments to other Projects/Tasks, Groups, Roles or any custom user field that includes select list options. As a result, you can set up your own attributes for use when searching for the appropriate users to assign to a specific task.

After you have selected your search parameters for filtering your user list, click on the Search button to view your search results and the users' availability for the selected period. Search results include the user full name, workload graph, schedulable hours, assigned hours, unassigned hours, % allocated and schedulable working days. The "schedulable" fields show how much total time the user has available for project work during the selected period, regardless of current assignments. Assigned hours shows how much of the schedulable time has been taken up with assignments for project work, while unassigned hours show the amount of time available. % allocation shows the percent of schedulable time is consumed by current assignments.

Aggregating Resource Availability

In addition to viewing individual resource availability metrics, you can report on aggregated availability numbers for selected groups of users. You can view total availability for selected Groups or Roles. You can also aggregate by selections in any user custom field that is set up as a select list. The fields in the search results will display the total time available or assigned for the selected groups. User Workload and Calendar Availability Graphs are not displayed when aggregating because they are specific to individual users.

User Workload Bar Graphs

Workload bar graphs displayed in the user search results provide a visual means for comparing user availability for a given period. These graphs allow you to determine who has the most time available or will have to work the least amount of overtime to complete their work for the period.

The different color blocks that make up the bar graphs represent different types of time scheduled (see figure 37.2):

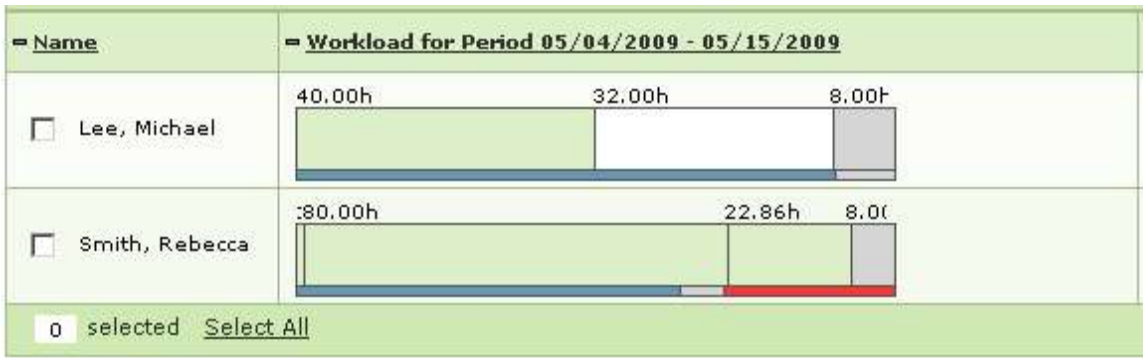


Figure 37.2. User Workload Bar Graph

- White always represents unassigned time/time available for project assignment. Comparing user bar graphs allows you to quickly locate users with the most time available by scanning for the largest blocks of white.
- Green represents time assigned to projects/tasks. Green blocks indicate different project assignments. Mousing over each block provides more details on the project/task assignment.
- Gray represents overhead time. Approved leave time, holiday time and the system wide overhead percentage amount (if any) are all reflected in the overhead time block. Likewise, the Schedulable Hours and Schedulable Working Days fields in the user search results are adjusted for the various components of overhead time. All users start with a base work day of 8 hours and a base work week of 5 days prior to overhead adjustments.
- Blue represents the total number of assigned and unassigned hours the user has available for the period based on the base work day and work week. It does not include overhead hours for the period, which are still shown in gray.
- Red represents the amount of overtime hours a user would have to work above and beyond the base schedule plus overhead time in order to complete the current assignment load on time. Just as comparing white blocks can help you to determine which users have the most time available, red blocks allow you to quickly scan for which users have the least time available.

Hover information is available for each block on the workload bar graphs. Hover information provides project names, owners and schedule details for the assignments or time off.

User Calendar Availability Graphs

Availability Calendar graphs displayed in the user search results provide a visual means for finding specific periods of full or partial availability. These graphs allow you to determine on what dates a user has time available for project work - and how much time is available on a given day.

The number scale on the left side of the bar shows the number of hours with the green bar height determining how many hours are assigned on a specific date. The numbers across the top of the bar represent the dates included in the period you defined when setting search parameters. The green bar shows project assignment time. The gray bar shows holiday or leave time that makes the user unavailable (see figure 37.3). Hovering over any of the bars provides detailed information on how much time is blocked off.

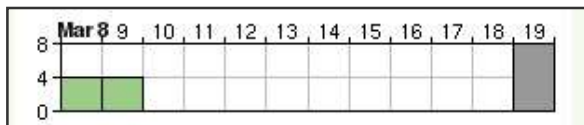


Figure 37.3. User Availability Calendar

It is also possible to view a larger and more detailed view of the availability calendar by selecting users from the search results and clicking on the Show Detailed Calendar button at the foot of the results. The detailed view shows the task names to the left of the graph with a green bar extending to the right indicating how long the assignment is scheduled to take. Hover information shows how much assignment work is scheduled per day. The height of the bar also indicates the number of hours per day relative the other bars on the chart. When you

are finished reviewing detailed calendars, you can click on the Return to Resource Availability button (see figure 37.4).

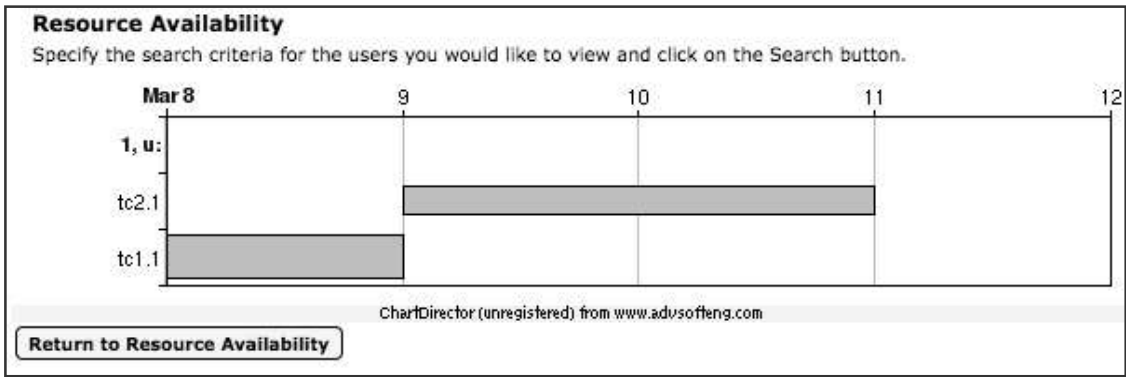


Figure 37.4.Detailed Availability Calendar

Resource Requisitions

Project managers have the option to send a resource requisition to a resource manager when they don't have the access to assign some or all resources directly. Configuration options determine how much access a project manager has to assign resources directly versus request resource assignments from resource managers. Resource managers have the option to fulfill the requisitions by assigning their team members, or they can decline the requisitions while tracking reasons in an auditable comments log. Both project and resource managers can move a requisition into discussion mode if more communication is needed to determine the outcome.

Resource requisitions can be created or managed by going to Management-->Resource Requisitions or clicking on the Create a Resource Requisition button on any task modification screen (see Figure 40.1).

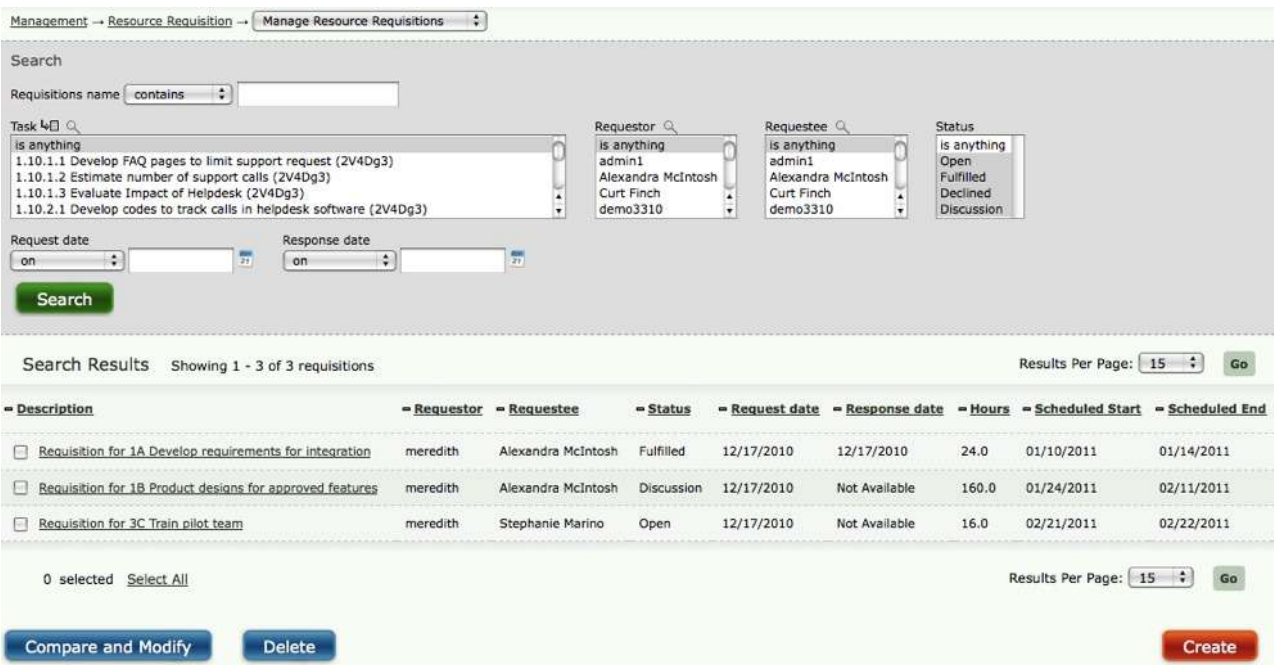


Figure 40.1 Resource Requisition main page

Managers with roles that include the abilities to create and modify projects and access to Scheduled Project Management will be able to create resource requisitions. Resource or department managers who fulfill the requisitions must have the same access and abilities listed above. Group memberships determine which resource managers a project manager can send requisitions to. Group access also determines the resources a resource manager can assign to fulfill a request.

Creating Resource Requisitions

You can create a new resource requisition by either clicking the Save and Create Requisition button located in the lower right corner of a selected task modification screen or going directly to Management-->Resource Requisitions-->Create Resource Requisition where you can select a task. Requisitions can only be created for tasks with unassigned work. The Requestor field is set automatically based on the user logged in. The Hours, Scheduled Start and Scheduled End fields are populated based on the task selection (see figure 40.2).

Figure 40.2 Resource Requisition creation

The Task field will be populated with your selection if you used the Save and Create Requisition on the task modification screen. If you go directly to the resource requisition creation screen via the navigation menu, you must choose a task from the Task select list. The Hours, Scheduled Start and Scheduled End fields will be populated with the task information after saving.

Next, specify a Requestee. The requestee is the department or resource manager who will be making the assignments or "fulfilling" the requisition. The hour glass icon next to the select list can be used to search for managers who preside over specific groups or with other custom attributes.

Next, select the Status. For new requests this will usually be "open". Requestees who review the requisitions can set the status to "fulfilled" or "declined" by acting upon the requisitions. The project managers who request the requisitions can also set open or declined requisitions to discussion status. Discussion status allows you to put requisitions on hold while the details are worked out amongst the managers.

Next, add any comments if necessary. The Comment field tracks the date and logged in user who adds the comment. All comments related to a requisition can be viewed in the Show History link that is displayed when comments exist. The comments are listed in chronological order and are preserved for reporting purposes.

When finished, click the Save button. To create another requisition, click the Save and New button. If email notifications are turned on for resource requisitions, the requestee will receive notice of the new requisition. Resource requisition email settings are under Configuration>System Settings>Resource Requisition.

Modifying and Deleting Resource Requisitions

To modify the information contained in an existing requisition, specify the search criteria for the request on the main resource requisition screen and click the Search button (see figure 40.1). The search results will be displayed below the criteria. From the search results, click the name of the requisition you would like to modify. This will direct you to the Resource Requisition Modification screen where you can modify the attributes of the request.

Alternatively, you have the ability to compare and modify multiple requisitions at the same time. From the search results on the main resource requisition screen, check the checkboxes of the requisitions that you would like to manage at once (see figure 40.1). Then go to the bottom of the screen and click the Compare and Modify button. This will take you to a Resource Requisition Modification screen that contains the attributes of the selected requisitions side by side (see figure 40.3).

The screenshot displays the 'Modify requisitiones' screen with a breadcrumb trail: Management → Resource Requisition → Manage Resource Requisitions → Modify requisitiones. The screen is divided into two columns for side-by-side comparison and modification.

	1B Product designs for approved features	3C Train pilot team
Task:	1B Product designs for approved features	3C Train pilot team
Requestor:	meredith	meredith
Requestee:	Alexandra McIntosh	Stephanie Marino
Request date:	12/17/2010	12/17/2010
Response date:	Not Available	Not Available
Hours:	160.00	16.00
Status:	discussion	open
Scheduled Start:	01/24/2011	02/21/2011
Scheduled End:	02/11/2011	02/22/2011
Comment:	Show History (2)	Show History (1)

At the bottom of the screen, there are three buttons: Save, Save and New, and Cancel.

Figure 40.3 Resource Requisition compare and modify

The system allows your organization to delete obsolete requisitions. To delete an existing requisition, specify the search criteria for the requisition on the main resource requisition screen and click the Search button (see figure 40.1). The search results will be displayed below the criteria. From the search results on the main resource requisition screen, select the requisitions that you would like to delete. Then go to the bottom of the screen and click the Delete button.

Fulfilling, Declining and Discussing Resource Requisitions

The department or resource managers who receive requisitions as the "requestees" will see the requisitions in the search results on the main resource requisition screen. To act upon a requisition, specify the search criteria for the request on the main resource requisition screen

and click the Search button (see figure 40.1). The search results will be displayed below the criteria. From the search results, click the name of the requisition you would like to manage.

This will direct you to the Resource Requisition Modification screen for requestees where you have two options for acting upon the requisition (see figure 40.4):

1. Click on the Save and Assign Resource button to fulfill the request by making explicit resource assignments to the task. When the task associated with the requisition is fully assigned, the requisition status is automatically changed to fulfilled. Depending on your email settings, the project manager who requested the requisition may receive an email notice when it is fulfilled.
2. Click on the Decline Requisition button to change the status of the requisition to declined. Depending on your email settings, the project manager who requested the requisition may receive an email notice when it is declined. The requesting project manager can then move the requisition to discussion status, delete it or maintain it for reporting purposes.

Management → Resource Requisition → Manage Resource Requisitions → Modify 1B Product designs for approved features (project 1B Product designs for approved features)

Task:	1B Product designs for approved features		
Requestor:	meredith	Requestee:	Alexandra McIntosh
Request date:	12/17/2010	Response date:	Not Available
Hours:	160.00	Status:	Discussion
Scheduled Start:	01/24/2011	Scheduled End:	02/11/2011
Comment:	Show History (2) <div style="border: 1px solid black; height: 40px; width: 100%;"></div>		

Figure 40.4 Resource Requisition modification for requestees

Entry Columns

Entry Column management is located under Management→Entry Columns (see figure 20.1). Entry Columns include the selectable items within the dropdown selections located in users' timesheets, expense sheets, and mileage sheets. They allow you to manage the selectable values for object dropdowns such as Activities, Pay Types, Bill Types, Expense Codes, Source, etc.

Management → Entry Columns → **Activities**

Entry Columns contain the selectable values for columns on users' timesheets, expense sheets, and mileage sheets.

Search

Activity name or description contains

Group

- is anything
- (2wG28N)AT test_baseline
- (2wG28N)AU test_baseline
- (2wG28N)U zz1
- (2wG28N)U zz2

Status

- Loggable and Reportable
- Reportable Only
- Hidden

Search

Search Results Showing 1 - 5 of 5 Activities Results Per Page: 10 **Go**

Name	Description	Status
<input type="checkbox"/> Coding	Writing Software	Loggable and Reportable
<input type="checkbox"/> Design/Plan	Designing or Planning	Loggable and Reportable
<input type="checkbox"/> G&A	General and Administrative	Loggable and Reportable
<input type="checkbox"/> Meetings	Time Spent in Meetings	Loggable and Reportable
<input type="checkbox"/> Other	Miscellaneous	Loggable and Reportable

0 selected [Select All](#) Results Per Page: 10 **Go**

Compare and Modify **Delete** **Create**

Figure 20.1. Entry Columns main page for Activities

To create a new item, you must select the create option for the Entry Column type from the navigation menu under Management→Entry Columns (see figure 20.1). You will be directed to the Entry Column Creation screen for the selected column (see figure 20.3).

Management → Entry Columns → Activities

To create an Entry Column Item, specify the name and attributes below.

Copy the settings of Activity: Coding **Load**

Name:

Description:

Status: Loggable and Reportable

Groups: (2wG28N)AT test_baseline
(2wG28N)AU test_baseline
(2wG28N)U zz1
(2wG28N)U zz2

☐ Add this Activity to all new Groups

Custom Fields

QuickBooks File ID:

QuickBooks ID:

Save **Save and New** **Cancel**

Figure 20.3. Entry Columns creation for Activities

Specify the name, description, and status of the item. 'Loggable and Reportable' indicates that the item is fully active (i.e. users can log time to this item and all time logged to this item can be reported on). 'Reportable Only' indicates that the item can no longer have time logged against it, but that any historical time, expense, or mileage already logged will be displayed in reports. 'Hidden' indicates that the item can neither be logged against nor can it be reported upon. Next, select the Groups that will have access to the item when those users in the Groups log time, expense, or mileage to the item. Furthermore, you may select whether the item will be automatically added to new Groups that are created. You may also specify values for any Custom Fields that the Administrator has setup for the items. When finished, click the 'Save' button.

Alternatively, on the Entry Column Creation screen you can copy the settings of another item by selecting an item and then clicking the Load button located at the top right corner (see figure 20.4). This will prepopulate that item's settings (with the exception of MS Project and QuickBooks Custom Fields) which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new item. When finished selecting and specifying attributes for the new item, you can simply click the Save button.

Management → Entry Columns → Activities

To create an Entry Column Item, specify the name and attributes below.

Copy the settings of Activity: Coding

Load

Name:

Description:

Status: Loggable and Reportable

Groups:

(2wG28N)AT test_baseline
(2wG28N)AU test_baseline
(2wG28N)U zz1
(2wG28N)U zz2

☐ Add this Activity to all new Groups

Custom Fields

QuickBooks File ID:

QuickBooks ID:

Save

Save and New

Cancel

Figure 20.4. Copy Entry Column Items

To modify existing Entry Column values, you must first specify the search criteria for the Entry Column type that you wish to modify (see figure 20.1 and 20.5). From the search results you can click the name of the Entry Column value to modify. You also have a few Batch Modification options which allow you to make changes to multiple Entry Column values more efficiently. For example, you can select multiple Entry Column values from the search results section and assign all the selected Entry Column values to Groups in the Batch Modifications section. Similarly, you can select multiple Entry Column values from the search results section and change the status of the selected Entry Column values from the Batch Modifications section.

Batch Modification Options (applies to selected results)

Assign to Group(s)

(2wG28N)AT test_baseline
(2wG28N)AU test_baseline
(2wG28N)U zz1
(2wG28N)U zz2
Group 1

☐ Remove current Group assignments.

Apply

Change Status

Loggable and Reportable
Reportable Only
Hidden

Apply

Figure 20.5. Entry Column batch modification

To delete an Entry Column value, check the Entry Column value to delete from the search results and click the Delete button (see figure 20.1).

Sheet Approval Plans

Sheet Approval Plans is located under Management→Approval Plans.

Sheet Approval Plans allow you to create an approval process for users who submit their timesheets, expense sheets, or mileage sheets after each period. Users who have been assigned to Approval Plans will be required to submit their sheets to be approved by the approvers specified in the Sheet Approval Plan.

Creating and Managing Sheet Approval Plans

To create a new Sheet Approval Plan, select the create option for the Approval Plan type in the navigation menu under Management→Approval Plans (see figure 21.1). This will direct you to the Sheet Approval Plan Creation screen, where you will configure the settings of the new Approval Plan. Specify a name for the Approval Plan (see figure 21.3).

Management → Approval Plans → Manage Time Approval Plans

To create a new approval plan, specify the type of plan and click the 'Create Plan' button. You will then be taken to a screen where you can set up approvers and email settings.

Note: Organization Chart Manager is enabled. This feature manages Time Approval plans for you. You should not create or edit any Time Approval plans except the Org Time Approval Template, which should not be renamed.

Search

Plan name contains

Plan Type

Time Approvals

Search

Search Results

Showing 1 - 2 of 2 plans

Results Per Page: 10 Go

Plan Name	Plan Type	Levels	Users	Assignment
<input type="checkbox"/> Org Time Approval Template	Timesheet	1	0	Assign Users
<input type="checkbox"/> Time Approval 1	Timesheet	1	2	Assign Users

0 selected [Select All](#)

Results Per Page: 10 Go

Delete Plan

Plan type to create: Time Create Plan

Figure 21.1. Sheet Approval Plan main page

Management → Approval Plans → Create Time Approval Plan

Specify the name, approvers and email settings for the approval plan. Approval plans do not go into effect until they are assigned to users.
 Note: Organization Chart Manager is enabled. This feature manages Time Approval plans for you. You should not create or edit any Time Approval plans except the Org Time Approval Template, which should not be renamed.

Plan Name:

Currently Active?

Users Assigned this Plan: 0

Approvers for the Plan

Level	Approver Full Name	Approver Login
Add New: 1	<input type="button" value="Select an Approver"/>	<input type="button" value="Select an Approver"/>

Backup Approvers (optional) for the Plan

Level	Approver Full Name	Approver Login
Add New: 1	<input type="button" value="Select an Approver"/>	<input type="button" value="Select an Approver"/>

Approval Email Configuration for Plan ""

Figure 21.3. Approval Plan creation


The Currently Active dropdown allows you to choose between 'yes' and 'no.' If you want the Approval Plan to take effect immediately, you should set this option to 'yes.' The 'no' option is provided as a way to turn off the approval plan if you should ever find a need to have that process disabled. Please note that if you turn an Approval Plan off, any records that are 'in process' at the time you disable the process will continue through to completion. Next, select the Primary Approver(s) and Backup Approver(s) for the Approval Plan. Selection of a Backup Approver is optional. A sheet will be directed to the Backup Approver only if the Primary Approver has not taken any action on the sheet submitted for approval. The system allows you to select as many levels of Primary Approvers and Backup Approvers for each Approval Plan as you like. You may choose to select each Primary Approver by either the Username or Full Name. These dropdowns are dependent on one another, so as you select a name in one dropdown, the other will dynamically update itself. To add more approval levels to this Approval Plan, you must first save the Approval Plan by clicking the Save button. Once saved, the screen will refresh allowing you to select an additional level of Approvers and Backup Approvers. To remove an approval level, simply check the respective Remove checkbox and click the Save button. This will refresh the Approval Plan screen with the approvers having been removed.

To change the order of approvers within the Approval Plan, change the numbers in the Order text boxes to the left of each approver's name to reflect the new order of approvers. If you need to change only one approver level, you may use a decimal number to make the change.

The same processes apply when creating Expense and Mileage Sheet Approval Plans.

Once a Sheet Approval Plan has been created, you can go to Management→Approval Plans and choose the modify option for the Approval Plan type from the navigation menu to modify

it. On the main Approval Plans screen for each type, you will see a list of existing Sheet Approval Plans (see figure 21.1). Furthermore, you can view the number of approval levels under the Levels column. To view a list of users that have been assigned to the Approval Plan, click the respective number under the Users column. This will launch a pop-up window containing the assigned users (see figure 21.4). To manage an Approval Plan, simply click the name of the Approval Plan. This will direct you to the Approval Plan Management screen.



Time Approval Plan System Report				
Time Approval Plan	User Login	User Full Name	Approver Login	Approver Full Name
Time Approval 1	u1	1, u	pm1	1, pm
	u2	2, u		

Plain Text

Figure 21.4. Assigned users

To delete Approval Plans, select the Approval Plans and click the Delete Plan button from the main Approval Plans screen (see figure 21.1).

Sheet Approval Plan Email Settings

Each Sheet Approval Plan has Email Settings associated with it (see figure 21.3 and 21.5). Email Settings is located in its own collapsible section in the Approval Plan Creation and Management screens. In order for Email Settings to be enabled globally for all Approval Plans, you must specify the time of day that these emails are to be generated under Configuration→System Settings→Approval Plans(in the Approval Email Settings table). You must also have your mail server settings configured under Configuration→System Settings→Server and Email.

Approval Email Configuration for Plan "Time Approval 1"	
Journyx ProjectXecute Text Substitution Tags Explained	
Enable user notification of rejection?	<input type="button" value="No"/>
Subject line for user rejection notification	<ufn>'s <type>sheet for period <prd> has been
Message to be sent to the user if this sheet is rejected	<ufn>'s <type>sheet for period <prd> has been Rejected. reason: <reason>
<hr/>	
Enable user notification of approval?	<input type="button" value="No"/>
Subject line for user approval notification	<ufn>'s <type>sheet for period <prd> has been
Message to be sent to the user when a sheet is approved	<ufn>'s <type>sheet for period <prd> has been Approved
<hr/>	
Enable approver notification of submit?	<input type="button" value="No"/>
Subject line for approver notification	<type>sheet user: <uid> period: <prd> approval
Message to be sent to the approver when queued for approval	A <type>sheet had been submitted for your approval by user name: <ufn> login: <uid>
<hr/>	
Enable approver notification of resubmit?	<input type="button" value="No"/>
Subject line for approver notification of resubmit	REJECTED <type>sheet user: <uid> period: <prd>
Message to be sent to the approver when queued for approval from resubmit	A <type>sheet had been resubmitted for your approval by user name: <ufn> login: <uid>
<hr/>	
Enable notification of users before a sheet is due to be submitted?	<input type="button" value="No"/>
Subject line for user before notification	Submit <type>sheet reminder.

Figure 21.5. Approval Plan Email Settings

Within the Email Settings section of Approval Plans, you can view and manage the different emails that can be sent to approvers and users who have been assigned to the Approval Plan. The various Email Settings are detailed below.

User notification of rejection

When this email notification is enabled, the system will send an email to the user if his/her sheet has been rejected by any one of the approvers in this Approval Plan.

User notification of approval

When this email notification is enabled, the system will send an email to the user when his/her sheet has been approved by an approver.

Approver notification of sheet submission

When this email notification is enabled, the system will send an email to the approvers when an assigned user submits a sheet for approval.

Approver notification of sheet resubmission

When this email notification is enabled, the system will send an email to the approvers when an assigned user resubmits a sheet that had been previously rejected.

User notification of sheet due

When this email notification is enabled, the system will send a reminder email a specified number of days before a period ends to assigned users that their sheet is due for submission. The number of days can be set below the text section of this notification.

User notification of late sheet submission

When this email notification is enabled, the system will send a late notice email a specified number of days after a period ends to assigned users that their sheet is past due for submission. The number of days can be set below the text section of this notification.

Approver notification of late sheet submission by user

When this email notification is enabled, the system will send an email for late users a specified number of days after a period ends to assigned approvers. The number of days can be set below the text section of this notification.

Backup approver notification

When this email notification is enabled, the system will send an email at a specified point in time after a sheet has been submitted to, but not processed by, the primary approver associated with the Approval Plan. The sheet will be placed in the backup approver's queue a specified number of days after the period has ended if a submitted sheet has not been approved or rejected by the primary approver. The default is 1 day after the end of a period, though this value can be modified.

Late notice emails on weekends

This option allows you to decide if the late email notifications should be sent on weekends.

Email Log Options

The two email log options for each Approval Plan relate directly to the email log. The email log should generally only be used if you are having difficulties with the emails for this Approval Plan. Please enable these options only if instructed to do so by Journyx support.

The Email Setting fields for subject lines and messages accept plain text, HTML tags, and a selection of 'tricky tags' that pull information directly from the system database. The available tricky tags are given below along with the system information that the 'tricky tag' will display:

Tricky Tag	System Information Displayed
<uid>	Displays the username of the user who submitted the sheet for approval
<ufn>	Displays the full name of the user who submitted the sheet for approval
<uem>	Displays the email address of the user who submitted the sheet for approval
<uphn>	Displays the phone number of the user who submitted the sheet for approval
<rjid>	Displays the username of the approver rejecting the sheet
<rjfn>	Displays the full name of the approver rejecting the sheet

<rjem>	Displays the email address of the individual rejecting the sheet
<rjphn>	Displays the phone number of the individual rejecting the sheet
<aprid>	Displays the username of the final approver
<aprfn>	Displays the full name of the final approver
<aprem>	Displays the email address of the final approver
<aprphn>	Displays the phone number of the final approver
<baid>	Displays the username of the backup approver
<bafn>	Displays the full name of the backup approver
<baem>	Displays the email address of the backup approver
<reason>	Displays the rejection reason for the submitted sheet
<prd>	Displays the period of the submitted sheet
<type>	Displays the sheet type submitted (time, expense, or mileage)
<link>	Displays a link directly to the sheet that is the subject of the notification
<link=customlink>	Displays custom text as a link directly to the sheet that is the subject of the notification (when custom text is inserted in place of "customlink" and the system email format is set to HTML)

Assigning a Sheet Approval Plan to Users

Sheet Approval plans must be assigned to users before they can be applied. There are two methods of assigning an Approval Plan to users. You can assign users from the main Approval Plan screen for each approval type located under Management→Approval Plans. Here each Approval Plan has an Assignment column that contains an Assign Users link (see figure 21.1). This method is ideal if wanting to assign users without making any modifications to the Approval Plan itself. By clicking the Assign Users link, you will be taken through the assignment process (see figure 21.6). The first step is to specify the search criteria for the users that you would like to assign to the Approval Plan. Once you have specified the search criteria, click the Search button. The search results will be displayed below the criteria. From the search results, select the users to assign to the Sheet Approval Plan and click the Assign Approval Plan button.

[Management](#) → [Approval Plans](#) → [Manage Time Approval Plans](#) → Assign Time Approval

To create a new approval plan, specify the type of plan and click the 'Create Plan' button. You will then be taken to a screen where you can set up approvers and email settings.

Note: Organization Chart Manager is enabled. This feature manages Time Approval plans for you. You should not create or edit any Time Approval plans except the Org Time Approval Template, which should not be renamed.

✔ **Select users to assign.**

Search

User name

Group All

Project P1: Task 1
P1: Task 2
Project 1
root

Search

Search Results Showing 1 - 3 of 3 Users Results Per Page: 10

Name	Login	Time Approval	Expense Approval	Mileage Approval
<input type="checkbox"/> 1, pm	pm1	Create New	Create New	Create New
<input type="checkbox"/> 1, u	u1	active	Create New	Create New
<input type="checkbox"/> 2, u	u2	active	Create New	Create New

0 selected [Select All](#) Results Per Page: 10

Select an Approval Plan

Assign Approval Plan

Figure 21.6. User assignment

Alternatively, you may assign users from the Approval Plan Creation or Management screen. This method is ideal when initially creating an Approval Plan or when making changes to an Approval Plan before assigning users. At the bottom of these screens, you will notice a Save and Assign Users button (see figure 21.3). By clicking this button, you will be taken through the assignment process. The first step is to specify the search criteria for the users that you would like to assign to the Approval Plan. Once you have specified the search criteria, click the Search button. The search results will be displayed below the criteria. From the search results, select the users to assign to the Sheet Approval Plan and click the Assign Approval Plan button.

Memorized Sheets

Memorized Sheets is located under Management→Memorized Sheets.

Memorized Sheets allow you to save users' routine tasks with preset hours so that they do not have to repeatedly select them when entering time. A Memorized Sheet can contain one or more time entries. Each time entry will contain a Project, Task, Pay Type, Bill Type, Comment,

and hours. After creating a Memorized Sheet and assigning it to users or Groups, it will be accessible for loading into all of those users' timesheets thereafter.

User Memorized Sheets

Memorized Sheets can be created and managed for users and Groups. This section discusses Memorized Sheets that will be assigned to users. User Memorized Sheet management is located under Management→Memorized Sheets→User Memorized Sheets (see figure 22.1).

Management → Memorized Sheets → User Memorized Sheets

Memorized Sheets allow you to create commonly recurring tasks with preset hour counts. Specify the search criteria for the users you would like to manage, then click on the user's name in the search results to create and manage Memorized Sheets. Memorized Sheets can not be created for monthly and semi-monthly periods. Use weekly or bi-weekly memorized sheets for users with monthly or semi-monthly periods.

Search

User name: contains []

Status: Active, Inactive, Hidden

Group: is anything, All

Project: is anything, P1: Task 1, P1: Task 2, Project 1, root

Search

Search Results Showing 1 - 3 of 3 Users Results Per Page: 10 Go

Name	Login	Email Address	Employee Number	Phone Number
1. pm	pm1	Not Available	Not Available	Not Available
1. u	u1	Not Available	Not Available	Not Available
2. u	u2	Not Available	Not Available	Not Available

Results Per Page: 10 Go

Figure 22.1. User Memorized Sheets main page

To create a User Memorized Sheet, you must first select the user for whom you would like to create the Memorized Sheet. Specify the search criteria for users in the main User Memorized Sheets screen and click the Search button. The search results will be displayed below the criteria. Click the name of the user to create the Memorized Sheet. This will direct you to the Memorized Sheet management screen (see figure 22.2). This screen displays any Memorized Sheets that are already assigned to the user and will also allow you to create a new Memorized Sheet.



Figure 22.2. Memorized Sheets assigned to a user

To create a User Memorized Sheet, click the Create New Memorized Sheet button. This will load a blank timesheet where you can specify a name for the Memorized Sheet and select time entries containing Group, Project, Task, Pay Type, Bill Type, Comment, and hours worked (see figure 22.3). When finished, click the Save button. The Memorized Sheet will then be assigned to the selected user.



Figure 22.3. User Memorized Sheet creation

Additionally, if a user has been assigned more than one Memorized Sheet, you can select a single Memorized Sheet to be the default (see figure 22.2). When a Memorized Sheet is set to default for a user, that Memorized Sheet will be loaded by default in the user's timesheet at the beginning of each new period. The user will then have the option to save the default sheet or select another Memorized Sheet.

To manage existing Memorized Sheets for a user, you must first select the user you would like to manage (see figure 22.1). Specify the search criteria for users in the main User Memorized Sheets screen and click the Search button. The search results will be displayed below the criteria. Click the name of the user to manage. This will direct you to the Memorized Sheet management screen (see figure 22.2). This screen displays any Memorized Sheets that are already assigned to the user. Click the name of the Memorized Sheet to manage. This will load the Memorized Sheet and allow you to modify the time entries containing Group, Project, Task, Pay Type, Bill Type, Comment, and hours worked. When finished, click the Save button.

To delete a Memorized sheet, you must first select the user (see figure 22.1). Specify the search criteria for users in the main User Memorized Sheets screen and click the Search button. The search results will be displayed below the criteria. Click the name of the user to manage. This will direct you to the Memorized Sheet management screen (see figure 22.2).

This screen displays any Memorized Sheets that are already assigned to the user. Select the Memorized Sheets to delete and click the Delete button.

Group Memorized Sheets

Memorized Sheets can be created and managed for users and Groups. This section discusses Memorized Sheets that will be assigned to Groups. Group Memorized Sheet management is located under Management→Memorized Sheets→Group Memorized Sheets (see figure 22.4).

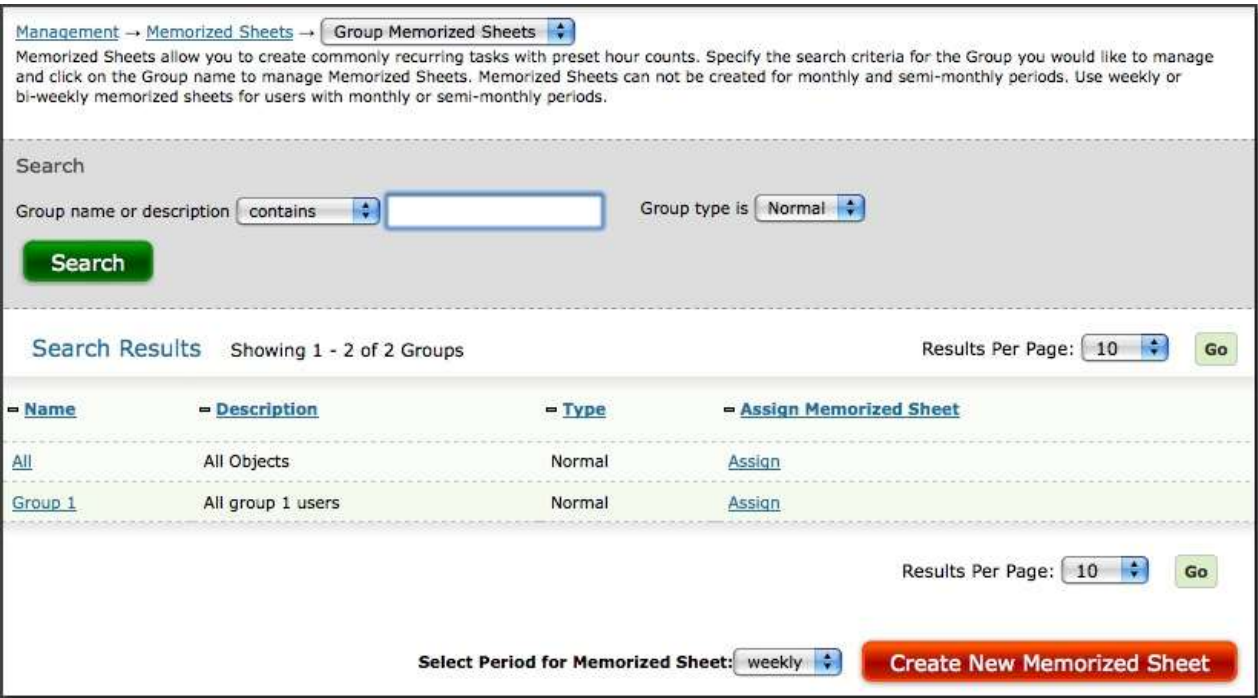


Figure 22.4. Group Memorized Sheets main page

To create a Group Memorized Sheet, select a Period and click the Create New Memorized Sheet button (see figure 22.5). This will load a blank timesheet where you can specify a name for the Memorized Sheet and select time entries containing Group, Project, Task, Pay Type, Bill Type, Comment, and hours worked (see figure 22.6).



Figure 22.5. Period selection

Management → Memorized Sheets → Group Memorized Sheets → Create Group Memorized Sheet

Name:

Group: Project: Activity: Pay Type: Bill Type: Comments:

Default Comments:

Sun 07/18	Mon 07/19	Tue 07/20	Wed 07/21	Thu 07/22	Fri 07/23	Sat 07/24	Total
							0:00
							0:00
							0:00
0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00

Save Cancel

Figure 22.6. Memorized Sheet creation

When finished, click the Save button. Once the Group Memorized Sheet has been created, it must be assigned to Groups. This can be done from the main Group Memorized Sheets screen located under Management→Memorized Sheets→Group Memorized Sheets (see figure 22.4). You must first select the Groups that you would like to assign the Memorized Sheet to. Specify the search criteria for Groups in the main Group Memorized Sheets screen and click the Search button. The search results will be displayed below the criteria. Next to the respective Group, click the 'assign' link. This will direct you to the Memorized Sheet management screen (see figure 22.7). This screen displays all Group Memorized Sheets. Select the Memorized Sheets to assign and click the Set Assignments button. The selected Memorized Sheets will now be assigned to the Group.

Management → Memorized Sheets → Group Memorized Sheets → Assign to Group 1

Memorized Sheet Name

<input checked="" type="checkbox"/>	Group Memorized Sheet 1
<input type="checkbox"/>	Group Memorized Sheet 2

Set Assignments

Figure 22.7. Memorized Sheet Group assignment

To delete a Group Memorized Sheet, you must first select the Group (see figure 22.4). Specify the search criteria for Groups in the main Group Memorized Sheets screen and click the Search button. The search results will be displayed below the criteria. Click the name of the Group to manage. This will direct you to a screen containing all the Memorized Sheets assigned to that Group (see figure 22.8). Select the Memorized Sheets to delete and click the Delete button. Keep in mind that deleting a Memorized Sheet for one Group will also delete the Memorized Sheet from all other Groups that were assigned to it.

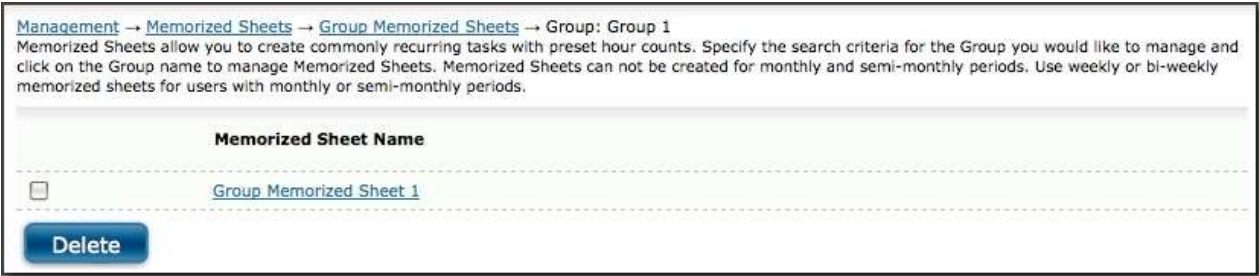


Figure 22.8. Memorized Sheet deletion

Memorized Entries

Memorized Entries is located under Management→Memorized Entries. Memorized Entries allow you to save users' most common tasks, expenses, or mileage so that they do not have to repeatedly select them in their timesheets, expense sheets, and mileage sheets. A Memorized Time Entry contains a single Project, Task, Pay Type, Bill Type, and Comment. After a time entry has been memorized and assigned to users or Groups, it will appear in all of those users' timesheets thereafter. Those users then only need to specify the hours, if any, for that task. Similarly, a Memorized Expense Entry contains a single Project, Expense Code, Currency, Source, and Comment. After an expense entry has been memorized and assigned to users or Groups, it will appear in those users' expense sheets thereafter. Users then only need to add hours, if any, for that task. Similarly, a Memorized Expense Entry contains a single Project, Expense Code, Currency, Source, and Comment. After an expense entry has been memorized and assigned to users or Groups, it will appear in those users' expense sheets thereafter. Users then only need to add an expense amount. Similarly, a Memorized Mileage Entry contains a single Project, Reason, Measurement, Vehicle, and Comment. After a mileage entry has been memorized and assigned to users or Groups, it will appear in those users' mileage sheets thereafter. Users then only need to add the actual distance traveled.

User Memorized Entries

Memorized Entries can be created and managed for users and Groups. This section discusses Memorized Entries that will be assigned to users. User Memorized Entry management is located under Management→Memorized Entries→User Memorized Entries (see figure 23.1).

Management → Memorized Entries → User Memorized Entries

Search

User name contains

Group

- is anything
- All
- Group 1

Project

- is anything
- P1: Task 1
- P1: Task 2
- Project 1
- root

Search

Search Results

Showing 1 - 4 of 4 Users

Results Per Page: 10 Go

Name	Login
<input type="checkbox"/> 1_pm	pm1
<input type="checkbox"/> 1_u	u1
<input type="checkbox"/> 2_u	u2
<input type="checkbox"/> meredith	meredith

0 selected Select All

Results Per Page: 10 Go

Modify

Figure 23.1. User Memorized Entries main page

To create a User Memorized Entry, you must first select the user for whom you would like to create the Memorized Entry. Specify the search criteria for users in the main User Memorized Entries screen and click the Search button. The search results will be displayed below the criteria. Select the user by clicking on the username. This will direct you to the Memorized Entry management screen (see figure 23.2).

Management → Memorized Entries → User Memorized Entries → Create User Memorized Entry

Memorized time entries are commonly recurring tasks displayed automatically in user timesheets. This new memorized entry will be inserted into your timesheets.

Select a memorized entry type:

Time

Load

User	Project	Activity	Pay Type	Bill Type	Comment
1, u	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	

Save

Save and New

Cancel

Create New Memorized Entry

The Group selection dropdown should only require a value selection if the Group column is included for tracking on your time entry screen.

Figure 23.2. User Memorized Time Entries

To create a Memorized Time Entry, select the 'Time' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Time Entries that have been assigned to the selected user (see figure 23.2). Click the Create New Memorized Entry button. This will load a blank Memorized Time Entry where you can select the Group, Project, Task, Pay Type, Bill Type, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Time Entry will then be assigned to the selected user.

To create a Memorized Expense Entry, select the 'Expense' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Expense Entries that have been assigned to the selected users (see figure 23.3). Click the Create New Memorized Entry button. This will load a blank Memorized Expense Entry where you can select the Project, Expense Code, Source, Currency, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Expense Entry will then be assigned to the selected users.

Management → Memorized Entries → User Memorized Entries → Create User Memorized Entry

Memorized expense entries are commonly recurring entries displayed automatically in user expense sheets. This new memorized entry will be inserted into your expense sheets.

Select a memorized entry type:

Expense

Load

User	Project	Expense Code	Source	Currency	Comment
1, u	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	

Save

Save and New

Cancel

Create New Memorized Entry

Figure 23.3. User Memorized Expense Entries

To create a Memorized Mileage Entry, select the 'Mileage' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Mileage Entries that have been assigned to the selected users (see figure 23.4). Click the Create New Memorized Entry button. This will load a blank Memorized Mileage Entry where you can select the Project, Reason, Measurement, Vehicle, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Mileage Entry will then be assigned to the selected users.

Management → Memorized Entries → User Memorized Entries → Create User Memorized Entry

Memorized mileage entries are commonly recurring entries displayed automatically in user mileage sheets. This new memorized entry will be inserted into your mileage sheets.

Select a memorized entry type:

Mileage

Load

User	Project	Measurement	Vehicle	Reason	Comment
1, u	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	

Save

Save and New

Cancel

Create New Memorized Entry

Figure 23.4. User Memorized Mileage Entries

To manage existing Memorized Entries for users, you must first select the user you would like to manage. Specify the search criteria for users in the main User Memorized Entries screen and click the Search button (see figure 23.1). The search results will be displayed below the criteria. Select the users to manage by clicking on the username. This will direct you to the Memorized Entry management screen. To manage Memorized Time Entries, select the 'Time' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Time Entries that have been assigned to the selected user (see figure 23.2). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Time Entry, select the entries and click the Delete button.

Similarly, to manage Memorized Expense Entries, select the 'Expense' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Expense Entries that have been assigned to the selected user (see figure 23.3). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Expense Entry, select the entries and click the Delete button.

Similarly, to manage Memorized Mileage Entries, select the 'Mileage' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Mileage Entries that have been assigned to the selected user (see figure 23.4). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Mileage Entry, select the entries and click the Delete button.

Group Memorized Entries

Memorized Entries can be created and managed for users and Groups. This section discusses Memorized Entries that will be assigned to Groups. Group Memorized Entry management is located under Management→Memorized Entries→Group Memorized Entries (see figure 23.5).

[Management](#) → [Memorized Entries](#) → [Group Memorized Entries](#)

Search

Group name or description contains

Search

Search Results

Showing 1 - 2 of 2 Groups

Results Per Page: 10 Go

Name	Description
<input type="checkbox"/> All	All Objects
<input type="checkbox"/> Group 1	All group 1 users

0 selected [Select All](#)

Results Per Page: 10 Go

Modify

Figure 23.5. Group Memorized Entries main page

To create a Group Memorized Entry, you must first select the group for which you would like to create the Memorized Entry. Specify the search criteria for Groups in the main Group Memorized Entries screen and click the Search button. The search results will be displayed below the criteria. Select the Group by clicking on the Group name. This will direct you to the Memorized Entry management screen (see figure 23.6).

[Management](#) → [Memorized Entries](#) → [Group Memorized Entries](#) → Create Group Memorized Entry

Memorized Entries are commonly recurring tasks that are displayed automatically in users' sheets.

Select a memorized entry type: Time Load

Group	Project	Activity	Pay Type	Bill Type	Comment
Group 1	<input type="text" value="root"/>	<input type="text" value="*Any*"/>	<input type="text" value="*Any*"/>	<input type="text" value="*Any*"/>	<input type="text"/>

Save

Save and New

Cancel

Create New Memorized Entry

The Group selection dropdown should only require a value selection if the Group column is included for tracking on your time entry screen.

Figure 23.6. Group Memorized Time Entries

To create a Memorized Time Entry, select the 'Time' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Time Entries that have been assigned to the selected Group (see figure 23.6). Click the Create New Memorized Entry button. This will load a blank Memorized Time Entry where you can select the Group, Project, Task, Pay Type, Bill Type, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Time Entry will then be assigned to the selected Group.

To create a Memorized Expense Entry, select the 'Expense' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Expense Entries that have been assigned to the selected Group (see figure 23.7). Click the Create New Memorized Entry button. This will load a blank Memorized Expense Entry where you can select the Project, Expense Code, Source, Currency, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Expense Entry will then be assigned to the selected Group.

Management → Memorized Entries → Group Memorized Entries → Create Group Memorized Entry

Memorized Entries are commonly recurring tasks that are displayed automatically in users' sheets.

Select a memorized entry type:

Expense

Load

Group	Project	Expense Code	Source	Currency	Comment
Group 1	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	
<div>Save</div> <div>Save and New</div> <div>Cancel</div>			<div>Create New Memorized Entry</div>		

Figure 23.7. Group Memorized Expense Entries

To create a Memorized Mileage Entry, select the 'Mileage' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Mileage Entries that have been assigned to the selected Group (see figure 23.8). Click the Create New Memorized Entry button. This will load a blank Memorized Mileage Entry where you can select the Project, Reason, Measurement, Vehicle, and Comment. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank. When finished, click the Save button. The Memorized Mileage Entry will then be assigned to the selected Group.

Management → Memorized Entries → Group Memorized Entries → Create Group Memorized Entry
 Memorized Entries are commonly recurring tasks that are displayed automatically in users' sheets.

Select a memorized entry type: Mileage Load

Group	Project	Measurement	Vehicle	Reason	Comment
Group 1	↳ 🔍 root	🔍 *Any*	🔍 *Any*	🔍 *Any*	

Save Save and New Cancel Create New Memorized Entry

Figure 23.8. Group Memorized Mileage Entries

To manage existing Memorized Entries for Groups, you must first select the Groups you would like to manage. Specify the search criteria for Groups in the main Group Memorized Entries screen and click the Search button. The search results will be displayed below the criteria. Select the Group you would like to edit by clicking on the Group name. This will direct you to the Memorized Entry management screen. To manage Memorized Time Entries, select the 'Time' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Time Entries that have been assigned to the selected Group (see figure 23.6). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Time Entry, select the entries and click the Delete button.

Similarly, to manage Memorized Expense Entries, select the 'Expense' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Expense Entries that have been assigned to the selected Groups (see figure 23.7). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Expense Entry, select the entries and click the Delete button.

Similarly, to manage Memorized Mileage Entries, select the 'Mileage' type from the dropdown selection at the top of the screen and click the Load button. This will load all existing Memorized Mileage Entries that have been assigned to the selected Groups (see figure 23.8). You can make modifications to the entries themselves from within the table. When finished, click the Save button. To delete a Memorized Mileage Entry, select the entries and click the Delete button.

Work Requests

Management of work requests is located under Management→Work Requests.

The system allows you to create work request for evaluation of proposed requests and new initiative suggestions. The system allows you to break down any parent/top level work request into tasks for further investigation and estimating. The main work request management screen serves as the master control panel for all work request creation, modification, promotion and/or deletion (see figure 38.1). Depending on your permissions in the system, you may be able to manipulate work requests in all the ways mentioned above, or you may be limited to creating and modifying your own requests only.

Work Request Management is used to evaluate suggestions and proposals for conversion to scheduled requests in the system. It allows you to create requests and append estimate, cost, and other information for the purposes of making a go/no go decision on initiating a new scheduled request. Anyone in the system can be granted the ability to submit new work requests. Roles with Manager Authority and the Work Request Modify ability can modify, promote or delete requests submitted by others.

Management → Work Requests → Manage Work Requests

View and submit requests for new work.

Search

Project name or description contains

Group: is anything, Work Request Group

Status: Reportable Only, Hidden

Project Parent: is anything, (5) root, (2) Work Request 1

Owner: is anything, Abbie Collins

Backup Owner: is anything, Abbie Collins

Search

Search Results Showing 1 - 5 of 4 Projects Results Per Page: 10 Go

Tree	Project Name	Description	Owner	Backup Owner	Priority	Planned Work	Create
▼	root	Default Parent Project			New	n/a	Create
☐ ▼	• Work Request 1	None			New	200.00	Create
☐	• • WR1: Task 1	None			New	80.00	Create
☐	• • WR1: Task 2	None			New	120.00	Create
☐	• Work Request 2	None			New	500.00	Create

0 selected Select All Results Per Page: 10 Go

Compare and Modify Delete View Utilizations Promote to Scheduled Project Create

Mark for Sync

Figure 38.1. Work Request Management main page

Creating Work Requests

You can create a new work request by clicking the Create button located in the lower right corner of the screen. Work requests created using the button in the lower right corner are created directly under root, the top level in the hierarchy. Root is simply the top of the tree for hierarchical sorting, and it may be renamed in your system. Clicking the Create button in the lower right corner will direct you to the Work Request Creation screen, where you can specify the attributes of the work request (see figure 38.2).

Management → Work Requests → Create Work Request

Copy the settings of Project:

Name:	<input type="text"/>	Status:	<input type="button" value="Reportable Only"/>
Description:	<div><div></div></div>	Parent:	<input type="button" value="root"/>
	(Maximum characters: 250) You have 250 characters left.		
Owner:	<input type="button" value="None"/>	Backup owner:	<input type="button" value="None"/>
	<input type="checkbox"/> Update all descendants with owner changes		
Children:	(None)	Groups:	<div>Work Request Group</div>
Project Type:	Work request	Requested by:	meredith (meredith)

Hours and Dates

Planned Work:	<input type="text"/>
Planned Start:	<input type="text"/> 21
Planned End:	<input type="text"/> 21
Planned Duration:	<input type="text"/>

Financials

Custom Fields

Figure 38.2. Work request creation

Specify a name for the work request . Although the system allows up to 252 characters for each request name, Journyx recommends short names in order to keep browser views of the names manageable. Enter a description for the new work request.

The Owner and Backup owner selection fields are optional. The purpose of establishing ownership is to limit work request modification access, regardless of Group membership, to the owner and backup owner. If both fields are set to None, any user with group access to the work request, Manager Authority and role abilities for modifying work requests will be able to modify the work request. If a request Manager is designated as a work request's owner, other request Managers with group access to the request will not be able to modify the request. They will see a read-only view. The creator of the request and any system Administrators are the only ones who can set an owner and will always be able to modify the request regardless of ownership. Owners cannot change the owner field, but they can set the Backup owner field.

Quick Guide to Project Access Rights

Account Type	Projects	Read Only	Edit Access
Administrator	All projects		x
Project Creator	Projects created		x*
Project Manager/Owner	Projects in Groups		x
Project Manager/Backup Owner	Projects in Groups		x**
Project Manager/Non-Owner	Projects in Groups	x	

*Creator has edit access until a project owner is set.

**Backup owner has edit access for all project fields except the owner field.

Next, specify the status of the work request: Reportable Only or Hidden. Work requests that are set to reportable only can be reviewed and modified during the mark up process. The only reason to mark a work request as hidden is for archiving purposes. If review of a request is put on hold, you can hide it and it can't be modified. When you are ready to resume review, you can search on hidden work requests and change the status back to reportable only.

Next, select which existing Groups should have access to the new request. Multiple Groups may be selected by using the shift-click or ctrl-click functionality. You can always change which Groups have access to any given request later. The groups shown in the Groups field are work request type groups. No other types of groups will appear in the Groups field for work requests. The system includes a default Work Requests group to which you can add users who need access to view and modify requests. You can also create your own work request type groups under Management-->Groups. You can use additional groups to determine which users manage various types of requests. You can also use work request type groups to store rejected work requests for future reference.

Next, fill in your planned work hours and dates for the work if known. You can also add those values at the task level if you decide to break the request into tasks and have the total scheduled work and dates roll up from the tasks underneath it. You can also fill in work and dates if you plan to use the request as a placeholder for the time being. When you break it into tasks at a later date (either while it's a request or after it's been promoted to a scheduled request), the work and dates will be recalculated to roll up from the tasks underneath the request/request. Planned Work is entered in number of hours with up to 2 decimal places. Dates are entered in the short date format configured for your system. Duration is automatically calculated based on Planned Start and End Dates and always includes the total number of calendar days between two dates.

Next, you can fill in your Financials if you want to evaluate your budget and potential return as part of the review process. Reports assume that Budgeted Cost, Return and Profit are in a currency denomination, and Budgeted ROI is a percentage.

When finished specifying the primary attributes, you may optionally configure the Custom Fields for the request. When finished, click the Save button. To create another request, click the Save and New button. To view potential resource availability for the request dates and work by group or individual, click on the Save and View Assignments button.

Alternatively, on the Work Request Creation screen you can copy the settings of another request by searching for and selecting a request and then clicking the Load button located at the top right corner (see figure 38.3). This will pre-populate that request's settings which you can use as a template of sorts. After clicking the Load button, you can modify the attributes that will be unique to the new request. When finished selecting and specifying attributes for the new request, you can simply click the Save button.



Figure 33.3.Copy another request

Breaking Work Requests Into Tasks/Summary Tasks

The system allows you to create requests under root, as well as tasks under requests. Creating tasks/summary tasks under work requests can be done from the main work requests screen. To create a task/summary task under a request, click the respective 'Create' link in the last column of the request row in search results (see figure 38.1). This will direct you to the Work Request Creation screen, where you can specify the attributes of the task/summary task. Notice that the parent is the request or summary task that you selected from the search results. Like work requests, planned work and date values will be rolled up from the tasks if you are creating a summary task. When finished entering the primary attributes and Custom Field values, click the Save button. To create another task, click the Save and New button. To view potential resource availability for the request dates and work by group or individual, click on the Save and View Assignments button.

Modifying and Deleting an Existing Request

To modify the information contained in an existing request, specify the search criteria for the request on the main work request screen and click the Search button (see figure 38.1). The search results will be displayed below the criteria. From the search results, click the name of the request or request task you would like to modify. This will direct you to the Work Request Modification screen where you can modify the attributes of the request.

Alternatively, you have the ability to compare and modify multiple requests or request tasks at the same time. From the search results on the main work request screen, check the checkboxes of the requests or request tasks that you would like to manage at once (see figure 38.1). Then go to the bottom of the screen and click the Compare and Modify button. This will take you to a Work Request Modification screen that contains the attributes of the selected requests side by side (see figure 38.4).

Management → Work Requests → Manage Work Requests → Modify Projects

Name: WR1: Task 1 Status: Reportable Only Description: (Maximum characters: 250) You have 250 characters left. Parent: Work Request 1 Owner: None <input type="checkbox"/> Update all descendants with owner changes Backup owner: None Children: WR1: Task 1 has 0 Work Requests directly under it. Create a new child Work Request Groups: Work Request Group Project Type: Work request Requested by: meredith (meredith)	Name: WR1: Task 2 Status: Reportable Only Description: (Maximum characters: 250) You have 250 characters left. Parent: Work Request 1 Owner: None <input type="checkbox"/> Update all descendants with owner changes Backup owner: None Children: WR1: Task 2 has 0 Work Requests directly under it. Create a new child Work Request Groups: Work Request Group Project Type: Work request Requested by: meredith (meredith)
---	---

Hours and Dates

Planned Work:	80.00 80.00 unassigned hours	120.00 120.00 unassigned hours
Planned Start:	07/12/2010	07/19/2010
Planned End:	07/17/2010	07/30/2010

Figure 38.4.request compare and modify

Once you have finalized the information associated with a work request and its tasks, and you have approved the request for initiation, you can promote the request to scheduled request status in the Journyx system. There are two ways to promote a work request. The first way is to select the work request and all its tasks on the work request management screen and click on the Promote to Scheduled request button. After clicking on the button, your request, its tasks and all the values associated with it will appear in the hierarchy on Scheduled request Management. After promotion you can continue to adjust the request plan, or you can start making assignments immediately. NOTE: You cannot create assignments for work requests. You can only preview potential resource availability. The second way to promote a work request and its tasks is to click on the Mark for Sync button. This option is specific to customers who do request planning in MS request and use Journyx requestlink to sync MS request plans to the Journyx system. If you mark a work request for sync, you can then open a blank MS request file and run the requestlink integration. At the bottom of the Journyx sync window, there is a button for importing work requests. When you enter your login information and click on the work requests button, you will see a list from which you can select the work request(s) you want to use to create a new MS request plan. After you have marked up the plan and made assignments in MS request, you can use requestlink to sync with the Journyx system and transfer the work request to scheduled project management.

The system allows your organization to delete unused or obsolete requests. To delete an existing request, specify the search criteria for the request on the main work request screen

and click the Search button (see figure 38.1). The search results will be displayed below the criteria. From the search results on the main work request screen, select the requests that you would like to delete. Then go to the bottom of the screen and click the Delete button.

Sorting Work Requests

Once you have created several requests, you can decide how to sort them on the main work request screen. You can choose to sort the visible requests by one of three methods: position within the request tree, alphabetical by request name, or alphabetical by request description. requests are sorted hierarchically by default. To change the sorting order for the screen you are currently viewing, click the column header for Tree, Request Name, or Description. The system will refresh the main work request screen and the visible requests will be sorted by the method you indicated.

In addition to the hierarchical Tree sort method, you may also use the yellow and blue arrow icons to view sections within the request hierarchy (see figure 38.1). Yellow arrows appear next to any request that has tasks/summary tasks underneath it. Clicking on the yellow arrow opens up a single level of the hierarchy which will show the 'descendants' underneath the selected request. If a request has more than one level of descendants (summary tasks and tasks), a blue arrow icon will also be displayed next to the request (see figure 38.1). Clicking on the blue arrow icon displays all levels of the hierarchy below the selected request. After expanding a level, you may collapse a level by clicking the respective yellow arrow icon again.

Please note that choosing a sorting method other than the default applies to the current page view only. Leaving the main work request screen and returning later will reset your view to the default sorting method.

Batch Modification

In addition to making modifications to requests by clicking the name or using the Compare and Modify feature, you have the ability to make batch modifications at the bottom of the main work requests screen (see figure 38.1 and 38.5). Batch modification allows you to efficiently make modifications to several requests at once instead of having to load each request separately. You are able to change the Group affiliation and status of multiple requests at once. To modify existing requests using the batch modification feature, specify the search criteria for the requests on the main work requests screen and click the Search button. The search results will be displayed below the criteria. From the search results, select the names of the requests you would like to edit using batch modification. Then go to the bottom of the screen and decide the type of batch modification to perform. You can assign Groups to the selected requests or change Group assignments by selecting the Groups and clicking the respective Apply button. You can change the status of the selected requests by selecting the status and clicking the respective Apply button.

Figure 33.5.request batch modification

Domains

Domains management is located under Management→Domains.

The Domains feature provides a simple and powerful method for using one installation to handle multiple organizations. The system uses domains to provide a series of unique sub-installations that are largely independent of the master, or 'root' domain. Each of these sub-domains inherits certain characteristics, most notably the System Settings, of the root domain while at the same time having a degree of functional autonomy and database independence.

If your organization will be using the Domains feature, you should note that the root domain should only be used for basic system administration. Projects, Tasks, Pay Types, Bill Types, and any other items should not be created within the root domain. Additionally, user accounts other than Root Domain Administrators should not be created within the root domain. At least one sub-domain should be created to handle these regularly used objects.

Each of the sub-domains in the system is dependent on the root domain to a certain extent, but each remains unique from any other domain. Each sub-domain is essentially a separate installation of Timesheet. Each sub-domain is created by the administrator of the root domain, who designates a domain administrator for each of these sub-domains. Each of the sub-domain administrators may add users, projects, etc. to the new domain. All domains, root and sub-domains, are fully independent of one another in terms of Projects, Users, Tasks, Pay Types, Bill Types, etc. Items in separate domains are completely isolated from one another. For example, a Project in one domain can never be viewed by a user who is logged into a different domain, including any reports. Furthermore, any item that is created in one domain can never be moved to a different domain.

Server and Database Considerations

Data from different domains is all stored within a single database. Therefore all domains will have to coordinate back-end maintenance and backup schedules.

Because there is a single database containing all domain data, external reporting is slightly more complex than with a non-domain Timesheet installation. The data for separate domains is all stored in the same tables. Users, Projects, Tasks, and other items that are

assigned to domains all have a field in their primary table called <domain_id>. If you are writing an external report for 'all time for users in X domain' then you will need to query for all of the users in the user table that are in that domain and then query for all of the time records for those users.

Because of this table structure, external reporting can cross domains. This is simultaneously a feature and a security issue. It is possible to have external reports that contain data from all domains, if desired. However, there is no way to ensure that external reports written by users in one domain do not access data in other domains. Please keep this in mind when planning your external reporting strategies.

Domains and Users

Users created within a sub-domain are unique to that sub-domain and cannot interact with users, projects, reports, etc. of other sub-domains or the root domain. The only crossing of these boundaries occurs at the main login screen, which is the same for all users and is controlled by the root domain. While users are unique to each sub-domain, because the initial login for every domain is handled through the root domain, usernames must be unique for each user, regardless of which domain that user occupies. Therefore, no two users may have the same username.

Licenses and Domains

Your Timesheet installation has a single license that allows a certain number of users and certain features. The license key is installed in the root domain. When creating sub-domains, you will specify a maximum number of users for each sub-domain. The total number of users granted access to the sub-domains may inadvertently exceed the total number of users that the license allows for the system. The number of active users in each sub-domain is subtracted from the number of users available to the root domain. The term 'active user' refers to any user who has entered time, expense, or mileage within the past 30 days.

If you have purchased the Rates and Rules Module, the Custom Roles Module, or the Custom Error Reporting Module, you can turn those modules on or off for each domain that you create. Additionally, you can enable or disable the Timekeeping functionality in each sub-domain.

The Root Domain

The root domain is an administrative domain only. There are several configuration and maintenance tasks that can only be performed in the root domain. Outside of these tasks, nothing, including time tracking, project creation, or reporting, should ever be done in the root domain.

The Administrator login to the root domain is extremely important. It is critical that you create a second root administrator as soon as you begin configuring your root domain for use. This second administrator account will be your backup in case you ever lose your primary administrator password. If you lock yourself out of the root domain, the only way to get back in will be to take your database offline and have the Journyx support team hand-modify your database.

Following is a list of the tasks that should occur in the root domain:

- All of the password security options located under Configuration→System Settings→Security
- The mail server settings for approval emails located under Configuration→System Settings→Server and Email
- Sub-domains can only be created and maintained in the root domain (i.e., there are no sub-sub-domains)
- If any sub-domain administrator is locked out of his/her domain, the root domain administrator can create a new sub-domain administrator account
- Once Disconnected User is enabled for domains, all of the relevant mail server settings will only be set in the root domain
- License keys can only be installed in the root domain
- The main login page colors, graphics, and text can only be defined in the root domain
- The Search Screens can only be defined in the root domain
- The Login Restriction can only be implemented from the root domain. When the Login Restriction is enabled, only the root domain administrator will be able to login to the application
- The Custom Link located in users' Toolbars can only be configured in the root domain
- The location of the Saved Reports folder can only be set within the root domain
- Optionally, you can define Custom Fields in the root domain and have new sub-domains inherit them. This will be useful for standardizing your Custom Fields across domains. This feature applies to all types of Custom Fields. If changes are made to the root domain's Custom Fields after the creation of a sub-domain, that sub-domain will not inherit the changes.

Sub-Domains

Sub-domains inherit settings from the root domain at the moment of creation. This includes color schemes, logos, and all other configuration settings. If preferences such as the color scheme are never modified in the sub-domain, but the preference is changed in the root domain, the sub-domain will inherit the color change automatically. All of the preferences and configuration options that are available in the core Timesheet product which are not listed above as being disabled or limited to the root domain are available within the sub-domains. Therefore, two sub-domains can have entirely different color schemes, logos, names for the entry columns, project management page configurations, etc.

Before beginning your implementation of domains, it would be a good idea to plan out any cross-domain reporting. You will want to consider the external cross-domain reporting as you plan each domain's configuration. For instance, if you want to have projects with identical names in multiple domains, and then report on that project, you should ensure that all sub-domains use the same column for projects.

In the current version, sub-domains cannot be deleted. Therefore you should not create extraneous sub-domains. If you need to do testing, it is imperative that you establish a test server and not do your testing in sub-domains in the production environment.

Creating and Modifying Sub-Domains

Sub-domains are created by an administrator in the root domain. To create a new sub-domain, go to Management→Domains (see figure 25.1). Here, click the Create Domain button. This will direct you to the Domain Creation screen (see figure 25.2). Each sub-domain is assigned a maximum number of users, a termination date, access to certain portions of the root domain's functionality, and an administrator who will be the primary administrator for the sub-domain. Specify a username for the new domain. This name will be seen by managers and administrators within the sub-domain. Specify the name of the administrator who will be managing this domain. Then specify whether the new sub-domain shall inherit all the Custom Fields of the root domain. Once the domain is created this option cannot be changed. The maximum number of users allowed access to the domain once again refers to the maximum number of 'active users', who are defined as users who have tracked time, expense, or mileage in the past 30 days. Then specify the number of days that the domain will be valid. Set this field to '10000' or more days for a perpetual domain.

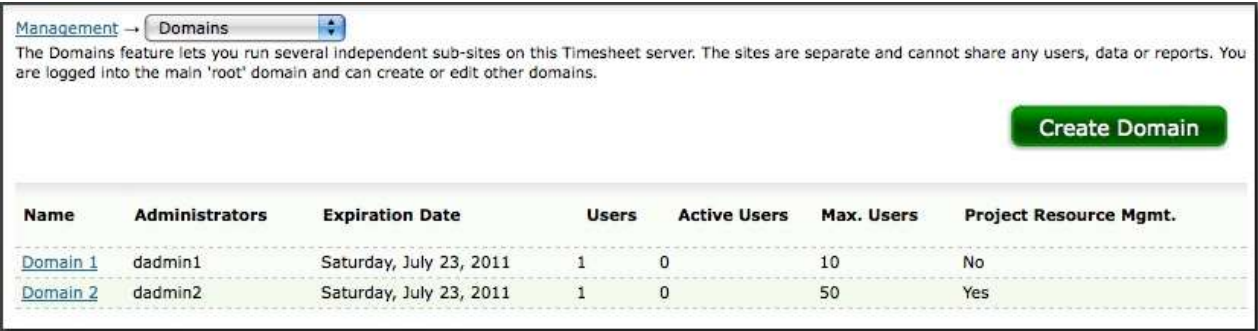


Figure 25.1. Domains main page

[Management](#) → [Domains](#) → Create Domain
Specify the attributes, administrators, functional privileges, and period of validity for the new domain.

Create Domain

Option	Setting
Domain name	<input type="text" value="New Domain"/>
Domain Administrator's name	<input type="text"/>
Default Custom Fields	<input checked="" type="radio"/> Use only shipped default Custom Fields. <input type="radio"/> Copy all Custom Fields from root domain.
Number of users allowed in this domain:	<input type="text" value="0"/>
Number of days (from creation) the domain is valid: expires on Friday, July 23, 2010	<input type="text" value="0"/>
Allow use of Project Resource Manager (PRM) features?	<input type="button" value="No"/>
Allow use of Timekeeping ability?	<input type="button" value="No"/>
Allow custom bug reports?	<input type="button" value="No"/>
Allow creation of new Custom Roles?	<input type="button" value="No"/>
Allow use of Rate Rules and Policies?	<input type="button" value="No"/>
Number of Disconnected Users allowed in this domain. (Use 0 to disable: 0 additional allowed, 0 currently assigned to users.)	<input type="text" value="0"/>

Figure 25.2. Sub-domain creation

You also have the additional option to decide whether the new sub-domain will allow use of Timekeeping, ability to re-route extended tracebacks, creation of Custom Roles, use of Rate and Rules Module, and use of Disconnected User feature. If the sub-domain does not have Timekeeping functionality, users within the sub-domain will be prevented from having the Timekeeper role assigned to them. For more information on Roles, please see the Roles section of this manual.

If the sub-domain does not have the ability to re-route extended tracebacks, customizable error reporting will be disabled in the sub-domain. If your organization has not purchased the Customizable Error Reporting Module for the root domain, this functionality will not be available in any sub-domain.

If the sub-domain does not have the Custom Roles feature, users within the sub-domain will be prevented from creating and managing Custom Roles. If your organization has not purchased the Custom Roles Module for the root domain, this functionality will not be available in any sub-domain.

If the sub-domain does not have the Rate Rules and Policies feature, users within the sub-domain will be prevented from creating and managing Rules and Policies. If your organization has not purchased the Rates and Rules Module for the root domain, this functionality will not be available in any sub-domain.

You can also specify the total number of Disconnected Users that will be allowed into the sub-domain. Disconnected users manage their time, expense, and mileage via email form submissions rather than through internet connection; hence the term 'disconnected user'. For more information about disconnected users, see the Disconnected Users section of this manual. Specify a value of '0' to disable disconnected users from accessing the sub-domain;

otherwise specify the maximum number of disconnected users who will have access. When finished, click the Save button.

To modify an existing sub-domain, go the main Domains screen located under Management→Domains. Here you will see a list of existing domains (see figure 24.1). Click the name of the domain that you wish to manage. This will direct you to the Domain Management screen (see figure 24.3). After creation, you are only able to modify a subset of the domain properties. You can create a new administrator by specifying a name and clicking the Create button.

[Management](#) → [Domains](#) → Modify Domain 1
Specify the attributes, administrators, functional privileges, and period of validity for the domain.

Option	Setting
Domain name	Domain 1
Number of users allowed in this domain:	10
Number of days (from creation) the domain is valid: expires on Saturday, July 23, 2011	365
Allow use of Project Resource Manager (PRM) features?	No
Allow use of Timekeeping ability?	No
Allow custom bug reports?	No
Allow creation of new Custom Roles?	No
Allow use of Rate Rules and Policies?	No
Number of Disconnected Users allowed in this domain. (Use 0 to disable: -1 additional allowed, 0 currently assigned to users.)	0

Save **Cancel**

Create A New Administrator For This Domain

Current Domain Administrator(s)	dadmin1
create	<input type="text"/>

Figure 24.3. Sub-domain management

The system does not currently support the deletion of sub-domains. However, if your organization has created a sub-domain that must be removed from active use, there is a method for effectively removing sub-domains. From the main Domains screen, create a new sub-domain administrator account for yourself in the sub-domain to be removed. Logout and login to the sub-domain to be removed using the new domain administrator account created. Modify all user accounts for the sub-domain to be removed by setting each user account to 'hidden' status. Logout of the sub-domain. Every user who has been set to 'hidden' status will no longer be able to access the system. Once a user has not accessed the system for 30 consecutive days, he will be effectively removed from the system and will no longer count against the number of users for which your organization purchased a license key. After this thirty day period, the sub-domain in question is effectively deleted.

Leave

Leave Requests

Leave Requests allow you to view and manage users' requested time off. Users are able to request leave under Leave→My Requests, where they can specify the dates and hours per day that they wish to request off. They can also select a Project, Task, Pay Type, Bill Type, and Comment. If you have the system configured to require notification of all Leave Requests, the user will see a list of all Managers and Administrators in his/her Groups, as well as his/her assigned Approvers, that have values in their Email Address fields. You may also limit this notification list to the user's designated time approvers. The user may choose one or more people from this list for notification.

Managers, Administrators, and Timekeepers are able to view Leave Requests under Leave→Leave Calendar (see figure 24.1). The calendar can be viewed daily, weekly, or monthly (see figure 24.1, 24.2, and 24.3). To change views, click the appropriate link in the top left corner or left margin of the calendar. The monthly and weekly views display the hours requested by each individual user along with any approved or declined requests for that user.



Figure 24.1. Leave Calendar monthly view

[Leave](#) →

Leave Calendar

View current and declined Leave Requests by day, week or month.

TODAY

 | 2010 | August |

⏪

⏩

 Week 2

Sunday 8/8	Monday 8/9	Tuesday 8/10	Wednesday 8/11	Thursday 8/12	Friday 8/13	Saturday 8/14
	<div>1, u (u1)</div> <div>8.00 Approved by meredith: None</div> <div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div>	<div>1, u (u1)</div> <div>8.00 Approved by meredith: None</div> <div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div>	<div>1, u (u1)</div> <div>8.00 Approved by meredith: None</div> <div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div> <div>2, u (u2)</div> <div><div><input type="checkbox"/> 4.00 Pending</div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div>	<div>1, u (u1)</div> <div>8.00 Approved by meredith: None</div> <div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div>	<div>1, u (u1)</div> <div>8.00 Approved by meredith: None</div> <div><div>● root</div><div>● Clerical</div><div>● Family Leave</div><div>● Billable</div></div>	

Approve

Decline

Reason:

Figure 24.2. Leave Calendar weekly view

Leave → Leave Calendar

View current and declined Leave Requests by day, week or month.

TODAY | 2010 | August | Week 2 | Wednesday, August 11, 2010

Wednesday, August 11, 2010

Status with Comment	User	Hours	Comment	Project	Activity	Pay Type	Bill Type
<input type="checkbox"/> Pending	2, u (u2)	4.00		root	Clerical	Family Leave	Billable
Approved by meredith: None	1, u (u1)	8.00		root	Clerical	Family Leave	Billable

Approve Decline Reason:

Figure 24.3. Leave Calendar daily view

On the daily or weekly views, you may decline a Request by selecting the Requests and clicking the Decline button (see figure 24.4). This will prompt a pop-up window allowing you to specify a reason before declining the Leave Request (see figure 24.5). Similarly, you may select the Requests to approve and click the Approve button. If you wish to make a comment with the approval, select the Requests to approve and click the Approve and Comment button. This will prompt a pop-up window allowing you to specify a comment that will be sent to the user's email address.

Under Configuration→System Settings→Leave Requests, there is a setting labeled '*Require approval of leave requests prior to loading them in user timesheets*'. If this setting is checked, then Leave Requests will not appear in users' timesheets until explicitly approved by the respective manager or supervisor. If this setting is unchecked, then the Leave Request will be automatically loaded into the user's timesheet when the user first views the period in which the Leave Request has been scheduled provided the request wasn't declined by the respective manager or supervisor. Once the Leave Request appears in the user's timesheet, the user must still save the time entries and submit the timesheet.

Leave → Manage Leave Requests → All Leave Requests

Search

User Comment or Approve/Decline Comment contains

Request Status

Pending

Approved

Declined

In Date Range

08/16/2010

Begin

End

Pay Type

is anything

Family Leave

Holiday

Jury Duty

Military Duty

User

is anything

1, pm

1, u

2, u

meredith

Project

is anything

P1: Task 1

P1: Task 2

Project 1

root

Search

Search Results

Showing 1 - 3 of 3 leave requests

Results Per Page: 10 Go

Status	User	Date	Hours	User Comment	Approver/Decliner with Comment	Project	Activity	Pay Type	Bill Type
<input type="checkbox"/> Pending	1, u (u1)	Thursday, August 26, 2010	8.0			root	Clerical	Family Leave	Billable
Approved	2, u (u2)	Friday, August 27, 2010	8.0		meredith (meredith)	root	Clerical	Family Leave	Billable
Declined	1, u (u1)	Friday, August 27, 2010	8.0		meredith (meredith): Others are already out.	root	Clerical	Family Leave	Billable

0 selected

Select All

Results Per Page: 10 Go

Approve

Decline

Reason:

Figure 24.4. User Leave Requests

Search Results

Showing 1 - 3 of 3 leave requests

Results Per Page: 10

Status	User	Date	Hours	User Comment	Approver/Decliner with Comment	Project	Activity	Pay Type
<input checked="" type="checkbox"/> Pending	1, u (u1)	Thursday, August 26, 2010	8.0			root	Clerical	Family Leave
Approved	2, u (u2)	Friday, August 27, 2010	8.0		meredith (meredith)	root	Clerical	Family Leave
Declined	1, u (u1)	Friday, August 27, 2010	8.0		meredith (meredith): Others are already out.	root	Clerical	Family Leave

1 selected

Select All

Results Per Page: 10

Approve

Decline

Reason: There is a mandatory team meeting on Aug 26.

Figure 24.5. Leave Request reason for decline

Journyx

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Leave Requests can only be loaded into timesheets that are open. Also, the system will check Accrual balances at the time of creation of a Leave Request. A warning will be triggered if the Accrual exceeds the balance at the time that the Leave Request is submitted, and the approver will be warned that the request will exceed current accrual balances at the time the request is approved. However, the request can still be submitted and approved (e.g., in the event a user will be granted more accrual hours in the interim).

Leave Request Settings

Leave Request Settings is managed under Configuration→System Settings→Leave Requests.

Here you can manage the requirements for requesting Leave as well as approving or rejecting Leave Requests. You can limit leave request approval to a user's designated time approvers. This section will also allow you to manage the emails associated with Leave Requests. For more information about these settings, please see the System Settings section of this manual.

Details on requesting leave can be found in the Time Entry section of this manual.

Approvals

Approving Timesheets

Time Approvals allow approvers within your organization to approve or reject users' timesheets for a particular period. In order to implement an approval process, a Sheet Approval Plan must first be created. Within the Sheet Approval Plan, approvers must be assigned. Then the Approval Plan must be assigned to users, who will submit their timesheets at the end of the period. After user submission, the timesheet enters the approval process and the designated approvers have approval/rejection authority over the timesheet. This section specifically discusses approving or rejecting timesheets that have been submitted by users. Approvals Plans can be created under Management→Approval Plans. For more information about creating and managing Sheet Approval Plans, please see the Approval Plans section of this manual.

If you have approving authority for particular users' timesheets, you can see a summary of what is awaiting your approval in the Approvals menu (see figure 26.1). Time Approvals is located under Approvals→Time Approvals (see figure 26.2).

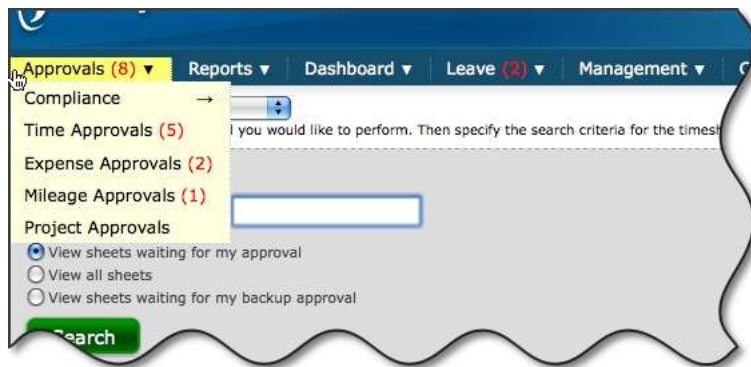


Figure 26.1. Approvals menu

Approvals → **Time Approvals**

Select the type of time approval you would like to perform. Then specify the search criteria for the timesheets you wish to approve.

Search

User name **contains**

☒ View sheets waiting for my approval
☐ View all sheets
☐ View sheets waiting for my backup approval

Search

Search Results Showing 1 - 3 of 3 Users Results Per Page: 10 **Go**

	Full Name	Username	Period	Total Amount	Status	Sheet History
<input type="checkbox"/>	1, u	u1	07/18/2010 - 07/24/2010 (view with rate report)	12.00	Submitted to pm1 for Approval	Sheet History
<input type="checkbox"/>	2, u	u2	07/18/2010 - 07/24/2010 (view with rate report)	40.00	Submitted to pm1 for Approval	Sheet History
<input type="checkbox"/>	2, u	u2	07/25/2010 - 07/31/2010 (view with rate report)	40.00	Submitted to pm1 for Approval	Sheet History

0 selected [Select All](#) Results Per Page: 10 **Go**

Reason for rejection
(Limited to 200 characters):

Approve **Reopen** **Reject**

Figure 26.2. Approving Timesheets

From this screen, you are able to approve and reject timesheets that are in your queue. You can also reopen timesheets that have been submitted or approved if you have Administrator authority. You must first specify the search criteria for the users that you wish to approve or reject timesheets for. You have the option to also select whether to filter for sheets awaiting your approval, all sheets, or sheets awaiting your backup approval. When finished specifying the search criteria, click the Search button. The search results will be displayed underneath the criteria. To approve timesheets, select the timesheets and click the Approve button. To reject timesheets, select the timesheets, specify a rejection reason, and click the Reject button. To reopen timesheets that have been submitted or approved, select the timesheets and click the Open button. When a sheet is reopened, the approval process gets completely reset. Once a sheet is reopened, anyone who has the ability to enter time for the employee (the employee, timekeepers) will be able to modify the records just as if the sheet had never been submitted for approval. The sheet reopen process does not maintain the original records that were submitted or approved and the sheet must be submitted for approval again. This option is only recommended when the correction requires that the original record be completely removed from the database. You can also view a user's timesheet before approving or rejecting it by clicking the respective date link under the Period column. Similarly, you can view the Rate Report for that user's timesheet by clicking the respective link under the Period column.

Time Approvals can be used exclusively or in combination with Project Approvals, which allow project managers to approve time logged to specific projects within a timesheet. For more information on Project Approvals, including information regarding use of Time Approvals

concurrently with Project Approvals, please see the Using Time Approvals with Project Approvals section of this manual.

Approving Expense Sheets

Expense Approvals allow approvers within your organization to approve or reject users' expense sheets for a particular period. In order to implement an approval process, a Sheet Approval Plan must first be created. Within the Sheet Approval Plan, approvers must be assigned. Then the Sheet Approval Plan must be assigned to users, who will submit their expense sheets at the end of the period. After user submission, the expense sheet enters the approval process and the designated approvers have approval/rejection authority over the expense sheet. This section specifically discusses approving or rejecting expense sheets that have been submitted by users. For more information about creating and managing Sheet Approval Plans, please see the Approval Plans section of this manual.

If you have approving authority for particular users' expense sheets, you can see a summary of what is awaiting your approval in the Approvals menu (see figure 26.1). Expense Approvals is located under Approvals→Expense Approvals (see figure 26.3).

The screenshot shows the 'Expense Approvals' interface. At the top, there's a breadcrumb 'Approvals → Expense Approvals' and a dropdown menu. Below it, a search instruction says: 'Select the type of expense approval you would like to perform. Then specify the search criteria for the expense sheets you wish to approve.'

The 'Search' section includes a 'User name' dropdown set to 'contains' with an empty text box. Below this are three radio buttons: 'View sheets waiting for my approval' (selected), 'View all sheets', and 'View sheets waiting for my backup approval'. A green 'Search' button is at the bottom of this section.

The 'Search Results' section shows 'Showing 1 - 2 of 2 Users'. It includes a table with columns: Full Name, Username, Period, Total Amount, Status, and Sheet History. There are two rows of data, each with a checkbox in the first column. Below the table, it says '0 selected' and 'Select All'. To the right, there's a 'Results Per Page' dropdown set to '10' and a 'Go' button.

At the bottom, there are three buttons: 'Approve', 'Reopen', and 'Reject'. To the right of these buttons is a text area labeled 'Reason for rejection (Limited to 200 characters):'.

	Full Name	Username	Period	Total Amount	Status	Sheet History
<input type="checkbox"/>	2, u	u2	07/25/2010 - 07/31/2010	100.00	Submitted to meredith for Approval	Sheet History
<input type="checkbox"/>	1, u	u1	07/25/2010 - 07/31/2010	50.00	Submitted to meredith for Approval	Sheet History

Figure 26.3. Approving Expense Sheets

From this screen, you are able to approve and reject expense sheets that are in queue. You can also reopen expense sheets that have been submitted or approved if you have Administrator authority. You must first specify the search criteria for the users that you wish to approve or reject expense sheets for. You have the option to also select whether to filter for sheets awaiting

your approval, all sheets, or sheets awaiting your backup approval. When finished specifying the search criteria, click the Search button. The search results will be displayed underneath the criteria. To approve expense sheets, select the expense sheets and click the Approve button. To reject expense sheets, select the expense sheets, specify a rejection reason, and click the Reject button. To reopen expense sheets that have been submitted or approved, select the expense sheets and click the Open button. When a sheet is reopened, the approval process gets completely reset. Once a sheet is reopened, anyone who has the ability to enter expenses for the employee (the employee, expense keepers) will be able to modify the records just as if the sheet had never been submitted for approval. The sheet reopen process does not maintain the original records that were submitted or approved and the sheet must be submitted for approval again. This option is only recommended when the correction requires that the original record be completely removed from the database. You can also view a user's expense sheet before approving or rejecting it by clicking the respective date link under the Period column.

Approving Mileage Sheets

Mileage Approvals allow approvers within your organization to approve or reject users' mileage sheets for a particular period. In order to implement an approval process, a Sheet Approval Plan must first be created. Within the Sheet Approval Plan, approvers must be assigned. Then the Sheet Approval Plan must be assigned to users, who will submit their mileage sheets at the end of the period. After user submission, the mileage sheet enters the approval process and the designated approvers have approval/rejection authority over the mileage sheet. This section specifically discusses approving or rejecting mileage sheets that have been submitted by users. For more information about creating and managing Sheet Approval Plans, please see the Approval Plans section of this manual.

If you have approving authority for particular users' mileage sheets, you can see a summary of what is awaiting your approval in the Approvals menu (see figure 26.1). Mileage Approvals is located under Approvals→Mileage Approvals (see figure 26.4).

Approvals → **Mileage Approvals**

Select the type of mileage approval you would like to perform. Then specify the search criteria for the mileage sheets you wish to approve.

Search

User name **contains**

☒ View sheets waiting for my approval
☐ View all sheets
☐ View sheets waiting for my backup approval

Search

Search Results Showing 1 - 1 of 1 Users Results Per Page: 10 **Go**

	Full Name	Username	Period	Total Amount	Status	Sheet History
<input type="checkbox"/>	2, u	u2	07/25/2010 - 07/31/2010	25.00	Submitted to meredith for Approval	Sheet History

0 selected Results Per Page: 10 **Go**

Reason for rejection
(Limited to 200 characters):

Approve Reopen Reject

Figure 26.4. Approving Mileage Sheets

From this screen, you are able to approve and reject mileage sheets that are in queue. You can also reopen mileage sheets that have been submitted or approved if you have Administrator authority. You must first specify the search criteria for the users that you wish to approve or reject mileage sheets for. You have the option to also select whether to filter for sheets awaiting your approval, all sheets, or sheets awaiting your backup approval. When finished specifying the search criteria, click the Search button. The search results will be displayed underneath the criteria. To approve mileage sheets, select the mileage sheets and click the Approve button. To reject mileage sheets, select the mileage sheets, specify a rejection reason, and click the Reject button. To reopen mileage sheets that have been submitted or approved, select the mileage sheets and click the Open button. When a sheet is reopened, the approval process gets completely reset. Once a sheet is reopened, anyone who has the ability to enter mileage for the employee (the employee, mileage keepers) will be able to modify the records just as if the sheet had never been submitted for approval. The sheet reopen process does not maintain the original records that were submitted or approved and the sheet must be submitted for approval again. This option is only recommended when the correction requires that the original record be completely removed from the database. You can also view a user's mileage sheet before approving or rejecting it by clicking the respective date link under the Period column.

Approving Project Entries

Project Approvals allow approvers within your organization to approve or reject users' submitted time, expense, and mileage entries for specific projects. This type of Project Approval Plan based on projects can be used concurrently with Sheet Approval Plans that allow assigned approvers to approve/reject entire timesheets, expense sheets, and mileage sheets. For example if a user has been assigned to an Sheet Approval Plan, his/her timesheets, expense sheets, or mileage sheets will go through that approval process. If the user logs time, expenses,

or mileage to a project that has been assigned a Project Approval Plan, those entries will go through a separate project approval process. Hence it is possible to be part of two approval processes, one for the sheet and another for the project. However, keep in mind that if an approver rejects a time entry for a project, the sheet approver will be required to approve any changes. Likewise, when a sheet approver rejects a sheet, the project approver may be required to approve changes if they affect the project in question. It is possible to force rejection for all approvers on a level if a single approver on the level rejects. Please see the next paragraph for more details.

Approval Plans for users' sheets run independently from project Approval Plans except when sheets that are in multiple approval plans require approval by all approvers on each level prior to proceeding to next level. This feature exists under System Settings→Approval Plans. If a user's sheet is assigned to multiple approval plans, this option will require approval at each tier within each approval plan before proceeding onward to the next tier of approvers. Hence, all primary approvers must first approve the sheet before it can proceed to the secondary approvers, and so forth. If an approver rejects a sheet on a particular level, it will be removed from all approvers' queues on the same level.

In order to implement a project approval process, an Approval Plan must first be created for the project. Within the Approval Plan, approvers must be assigned. When users submit their sheets containing time, expense, or mileage entries against the project, the entries will enter the approval process and the designated approvers will have approval/rejection authority over the individual time, expense, and mileage entries related to that project. This section specifically discusses approving or rejecting time, expense, and mileage entries that have been submitted by users for a designated project. For more information about creating and managing Approval Plans for projects, please see the Approval Plans section of this manual.

If you have approving authority for project entries submitted by users, you can see a summary of what is awaiting your approval in the Approvals menu (see figure 26.1). Project Approvals is located under Approvals→Project Approvals (see figure 26.5).

Approvals → Project Approvals

Select the project approval you would like to perform. You can approve project entries associated with a project.

Project: P1: Task 1

Project	User Login	User Name	Entry Type	Period	Approver Login	Approver Name	Status	Level	Amount	System Notes	
<input type="checkbox"/> P1: Task 1	u1	1, u	time	07/25/2010 - 07/31/2010	pm1	1, pm	Pending Approval	1/1	24.0	Sheet History	
									Total:	24.0	

Project: P1: Task 2

Project	User Login	User Name	Entry Type	Period	Approver Login	Approver Name	Status	Level	Amount	System Notes	
<input type="checkbox"/> P1: Task 2	u1	1, u	time	07/25/2010 - 07/31/2010	pm1	1, pm	Pending Approval	1/1	18.0	Sheet History	
									Total:	18.0	

Reason for rejection
(Limited to 200 characters):

Figure 26.5. Approving Project Entries

From this screen, you are able to approve and reject time, expense, or mileage entries that have been logged against the project. You can also reopen entries that have been submitted or approved if you have Administrator authority. To approve project entries, select the entries and click the Approve button. To reject project entries, select the entries, specify a rejection reason, and click the Reject button. To reopen project entries that have been submitted or approved, select the project entries and click the Open button. When an entry is reopened, the entire sheet is reopened and the approval process gets completely reset. Once a sheet is reopened, anyone who has the ability to enter time, expenses or mileage for the employee (the employee, timekeepers) will be able to modify the records just as if the sheet had never been submitted for approval. The sheet reopen process does not maintain the original records that were submitted or approved and the sheet must be submitted for approval again. This option is only recommended when the correction requires that the original record be completely removed from the database.

Advanced Approvals**Approval Groups and Loading Memorized Sheets**

Journyx Timesheet includes tools that allow Administrators to prepopulate users' timesheets with hours. To use the Mass Approval feature of Timesheet, the admin should first create Memorized Sheets that will be used for population purposes and then create Approval Groups for loading the default Memorized Sheets themselves. This section will focus on the interface for creating Approval Groups and loading Memorized Sheets into users' timesheets. See the section in this manual on Memorized Sheets to create sheets for users or groups and set default sheets.

Note: Each user who is assigned to an Approval Group must have a default Memorized Sheet assigned to him. If a user has access to exactly one Memorized Sheet, Timesheet will consider that Memorized Sheet to be the user's default sheet for automatic loading purposes.

Creating Approval Groups

Each Approval Group consists of an identifier and a number of users who are associated with that group. To create a new Approval Group, click the Create A New Approval Group link on the main Advanced Approvals screen (see figure 26.6). Timesheet will display the Create Approval Group screen.

Create Approval Group

[Create a New Approval Group](#) [Assign Users to Approval Groups](#)
[Load Default Memorized Sheet](#) [Execute Mass Approval](#)

Name

Create

Approval Group Name	Users	Last Action	Delete
Approval Group 1	View	None	

Figure 26.6. Approval Group main page

This screen is divided into two parts:

- The top portion of this screen contains the Create New Approval Group section, which consists of a text field for the name of the new group.
- The bottom portion of this screen contains a list of existing Approval Groups with the following information:
 - The Approval Group name
 - The number of users assigned to each group
 - The last action associated with each group

To create a new Approval Group, simply enter a name for the new group and click the Create button. Timesheet will refresh the Create Approval Group screen and display a green text message confirming the creation of the new Approval Group. Now that the group has been created, you will need to assign it to one or more users.

Assigning Approval Groups To Users

Approval Groups must be assigned to users before they can be implemented. To assign users to the Approval Group, click the Assign Users to Approval Group link located at the top of the main Approval Group screen. This will prompt the user search and assignment screen (see figure 26.7). Specify the search criteria for users and click the Search button. The search results will be displayed below the criteria. Select the Approval Plan to assign to the users in the search results and click the Assign button.

Note: The Approval Group assignment process does not allow you to select a subset of users from the returned search results. Therefore, each user who matched the search criteria, even those included in subsequent pages of search results will be assigned to the selected Approval Group when the Assign button is clicked.

Approval Group Assignment

[Create a New Approval Group](#)

[Load Default Memorized Sheet](#)

[Assign Users to Approval Groups](#)

[Execute Mass Approval](#)

Search

User name

contains

Project

is anything

P1: Task 1

P1: Task 2

Project 1

root

Group

is anything

All

Group 1

Search

Search Results

Showing 1 - 3 of 3 Users

Results Per Page: 10

Go

Name

1, pm

1, u

2, u

Login

pm1

u1

u2

Results Per Page: 10

Go

Approval Group 1

assign

Approval Group Name	Users	Last Action	Delete
Approval Group 1	View	None	

Figure 26.7. Approval Group assignment

Loading Memorized Sheets

Once the required Approval Groups have been created and assigned to users, you can load default Memorized Sheets into users' timesheets by clicking on the Load Memorized Sheets link on the main Advanced Approval screen. This will direct you to the Populate Approval Group Sheets screen (see figure 26.8). Specify the Approval Group, number of Time Periods, date to begin Memorized Sheet load, and an email address to where the auto-population report and any errors will be sent. When finished, click the Execute button. This will load the default Memorized Sheets for users that have been assigned to the Approval Group. An auto-population report will also be generated and sent to the specified email.

Populate Approval Group Sheets

[Create a New Approval Group](#)

[Load Default Memorized Sheet](#)

[Assign Users to Approval Groups](#)

[Execute Mass Approval](#)

Create New

Approval Group

Number of periods

Date in First Period

Email Address to Send Report

Approval Group 1

1

07/26/2010

Execute

Approval Group Name	Users	Last Action	Delete
Approval Group 1	View	On Monday, July 26, 2010 populated 1 timesheet(s) for 1 user(s). 1 periods from Sunday, July 25, 2010 to Saturday, July 31, 2010.	

Figure 26.8. Auto-loading Memorized Sheets to users' timesheets

The auto-population report will display a list of the users affected by the auto-population including:

- The number of timesheets affected
- The actual number of time records that were created
- The total hours that were applied for each user

If any errors were encountered during loading, they will also be reported. Potential errors that may be encountered during auto-loading of default Memorized Sheets are:

Time Already Exists For This User

The system will return this error if a selected time period already has hours entered. This exception will occur regardless of the status of those hours (i.e., saved or submitted, approved, or rejected). This error can be corrected by removing any time entries within that particular time period.

User Does Not Have A Default Memorized Sheet

The system will return this error if a user does not have a default Memorized Sheet assigned to him/her. This error can be corrected by assigning a default Memorized Sheet to the user(s) in question.

Other Standard Timesheet Errors

Additional errors, such as a user not having access to a particular project, task, pay type or bill type (as specified by group affiliation), may occur. These errors are standard system errors and must be corrected directly within product.

Mass Approvals

In addition to auto-loading Approval Groups, the system allows you to execute mass approvals of all open and submitted timesheets of users within an Approval Group. The Mass Approval Execution screen is available only via the sitemap under Approvals→Advanced. Once Approval Groups have been created and assigned to users, you can mass approve those users' timesheets by clicking on the Execute Mass Approval link on the main Advanced Approval screen. This will direct you to the Mass Approval Execution screen (see figure 26.9).

Note: Users must have an Approval Plan assigned to them before implementing a Mass Approval of open timesheets.

Approval Group Name	Users	Last Action	Delete
Approval Group 1	1 view	On Monday, July 26, 2010 populated 1 timesheet(s) for 1 user(s). 1 periods from Sunday, July 25, 2010 to Saturday, July 31, 2010.	

Figure 26.9. Mass approval of users' timesheets

To execute a Mass Approval of users' populated timesheets, select the Approval Group whose populated timesheets will be approved and specify an email address to which the Mass Approvals report should be mailed. When finished, click the Approve Open Timesheets button. The system will approve the timesheets for the users assigned to the Approval Group and a report will be sent to the specified email address detailing the results of the Mass Approval.

This Mass Approval report will display a list of the users affected by the Mass Approval including:

- The user login of each affected user
- The full name of each affected user
- The number of timesheets approved for each affected user

If any errors are encountered during the Mass Approvals process, they will also be reported. Potential errors that may be encountered during the execution of a Mass Approval are:

User does not have an approval plan assigned to him

Timesheet will return this error if a target user has not been assigned an approval plan within Timesheet. To correct this error, simply assign an Approval Plan to the affected user(s) under User Management.

Rate Rule Errors

Timesheet will return this error if a target timesheet violates an established Rate Rule. Timesheets that violate Rate Rules will be rejected and must be edited to comply with the Rate Rules that govern them.

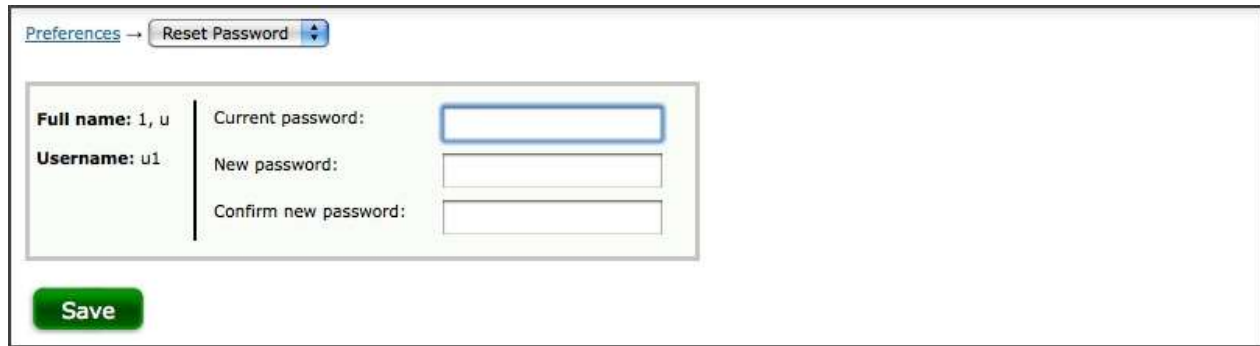
Note: Rate Rules are an optional expansion module that is available for Timesheet that your organization may not be using. If the Rates & Rules module is not being used by your organization, you will not receive any Rate Rule Errors when executing a Mass Approval of timesheets.

Preferences

Reset Password

Reset Password is located under Preferences→Reset Password (see figure 27.1).

The Reset Password screen displays your full name and username as shown in the system and reports. You have the ability to modify your password if you wish. To modify your password, you must specify your current password for security purposes. Then specify your new password that you would like to use when logging into the system. Confirm your new password by entering it again. When finished, click the Save button. Your password will be changed and you will have to use the new password the next time you login to the system.



The screenshot shows the 'Reset Password' screen. At the top, there is a breadcrumb trail: 'Preferences → Reset Password'. Below this, the user's information is displayed: 'Full name: 1, u' and 'Username: u1'. To the right of this information are three input fields: 'Current password:', 'New password:', and 'Confirm new password:'. Each field has a corresponding text input box. At the bottom left of the form, there is a green 'Save' button.

Figure 27.1. Reset password

Entry Screens

Entry Screens is located under Preferences→Entry Screens (see figure 27.2).

Entry Screen preferences allow you to select and configure your timesheets, expense sheets, and mileage sheets, as well as the reports associated with each.

[Preferences](#) → **Entry Screens**

Entry screen preferences contain the personal default settings for your timesheets, expense sheets, and mileage sheets.

Entry Screen Preferences

- ☐ On the Leave Management Calendar, limit the displayed requests to those I am authorized to approve
- ☐ Add inner scrollbars to fit wide entry screens into browser if necessary
- ☒ Suggest current entries based on the entries from up to period(s) back (max. 4)

Maximum number of items in selection drop downs:

Default comment for all entry screens:

Number of blank entries available on each screen:

Timesheet

Time entry screen: Default time report:

Punch screen: Number of manual in/out rows:

Stopwatch module:

Expense Sheets

Expense entry screen: Default expense report:

Mileage Sheets

Mileage entry screen: Default mileage report:

Save

Figure 27.2. Entry Screens preferences

If your system account includes Manager Authority, you will see the setting for limiting the leave requests you see on your Leave Management Calendar at the top of the screen. This setting allows you to filter the pending leave requests that are displayed on your Leave Management Calendar and limit them to the ones you can approve. If this setting is disabled, you will be able to see pending requests for all users in your groups regardless of whether or not you can approve them.

If your Timesheet Administrator has given you access to enhanced interface for popup searches, the option will appear in the top panel of Entry Screen Preferences. This option provides you with the ability to work with interactive search results when using the magnifying glass search icon on entry screens.

Inner scroll bars allow you to view wide timesheets, expense sheets or mileage sheets within the browser by adding scrolling bars for each section of the entry area.

If your administrator has given you permission, you may select the option to create current entries from time entries that were logged in previous periods. This is especially useful for short-term projects that span multiple periods. These temporary entries are not 'permanent' and will cease to be carried over into future periods when they go unused in the current period. You may also select how many periods of entries you would like pulled into the current period as temporary entries. Provided you are not assigned to a monthly period on your time entry screen, the default value of 1 pulls entries from the previous period only. If you set it to 2, it will pull

entries from the previous two periods. If you are assigned to a monthly period, the numeric value is applied in weeks (e.g., 1 pulls entries from the previous week only).

You can specify the number of Blank Entries to be displayed when you first open your timesheet, expense sheet, or mileage sheet. For example, if you typically work on five projects a day, you would want at least five Blank Entries to be automatically displayed when you open your timesheet. While entering your time, if you have fully utilized all your Blank Entries and require additional entries, click the Save button in your timesheet. This will save the entries and refresh the timesheet with a new set of Blank Entries.

You can also limit the number maximum number of items that are shown in selection dropdown on entry screens. This is helpful when you have access to long lists that cause screen loading to be slow. When the number of items in a selection dropdown exceeds this setting, the field is changed to a text field with search as the only option for selection.

The Default comment field allows you to set the comment that appears in all blank rows for time, expense and mileage sheets.

If your administrator has given you access to multiple timesheets, you may choose the type of timesheet you would like to use when recording hours worked on projects. Additionally, if made available by your administrator, you may choose a Stopwatch Module, which gives you access to the Stopwatch feature on your timesheet. Similarly, you may be able to select a Punch Screen.

If your administrator has given you access to multiple Time Reports, you may choose the default Time Report that you would like to see when previewing your timesheet for approval.

The number of Manual In/Out Rows accompanies the Time In/Out feature. Your administrator may have configured your timesheet to contain the Time In/Out feature. If so, this feature allows you to manually log the time that you begin and end your work day. You have the option of specifying the number of Manual In/Out rows to be displayed when you first open your timesheet. If you typically come to work and take one break before logging out for the day, you would want four manual In/Out Rows: the first row for when you come to work, the second row for logging out for break, the third row for coming back from break, and the fourth row for leaving for the day. When manually clocking your time, if you have fully utilized all your Manual In/Out Rows and require additional rows, click the Save button in your timesheet. This will save the rows and refresh the timesheet with a new set of Manual In/Out Rows.

If your administrator has given you access to multiple Expense Sheets, you may choose the type of Expense Sheet you would like to use when recording business related project expenses.

Similarly, if your administrator given you access to multiple Expense Reports, you may choose the default Expense Report that you would like to see when previewing your expense sheet for approval.

If your administrator has given you access to multiple Mileage Sheets, you may choose the type of Mileage Entry Screen you would like to use when recording business related travel.

Similarly, if your administrator has created multiple Mileage Reports, you may choose the default Mileage Report that you would like to see when previewing your mileage sheet for approval.

For the My Assignments screen, you have the option to list your assignments alphabetically or group them by project and summary task(s). Selecting the Display assignments by project and

summary task on My Assignments setting will add project and summary rows above the list of associated tasks.

My Projects

My Projects is located under Preferences→My Projects (see figure 27.3).

In some organizations, having to search through extensive lists of projects can be quite time consuming when managing time and expenses. The My Projects feature allows you to select the projects that you typically track for time and expenses.

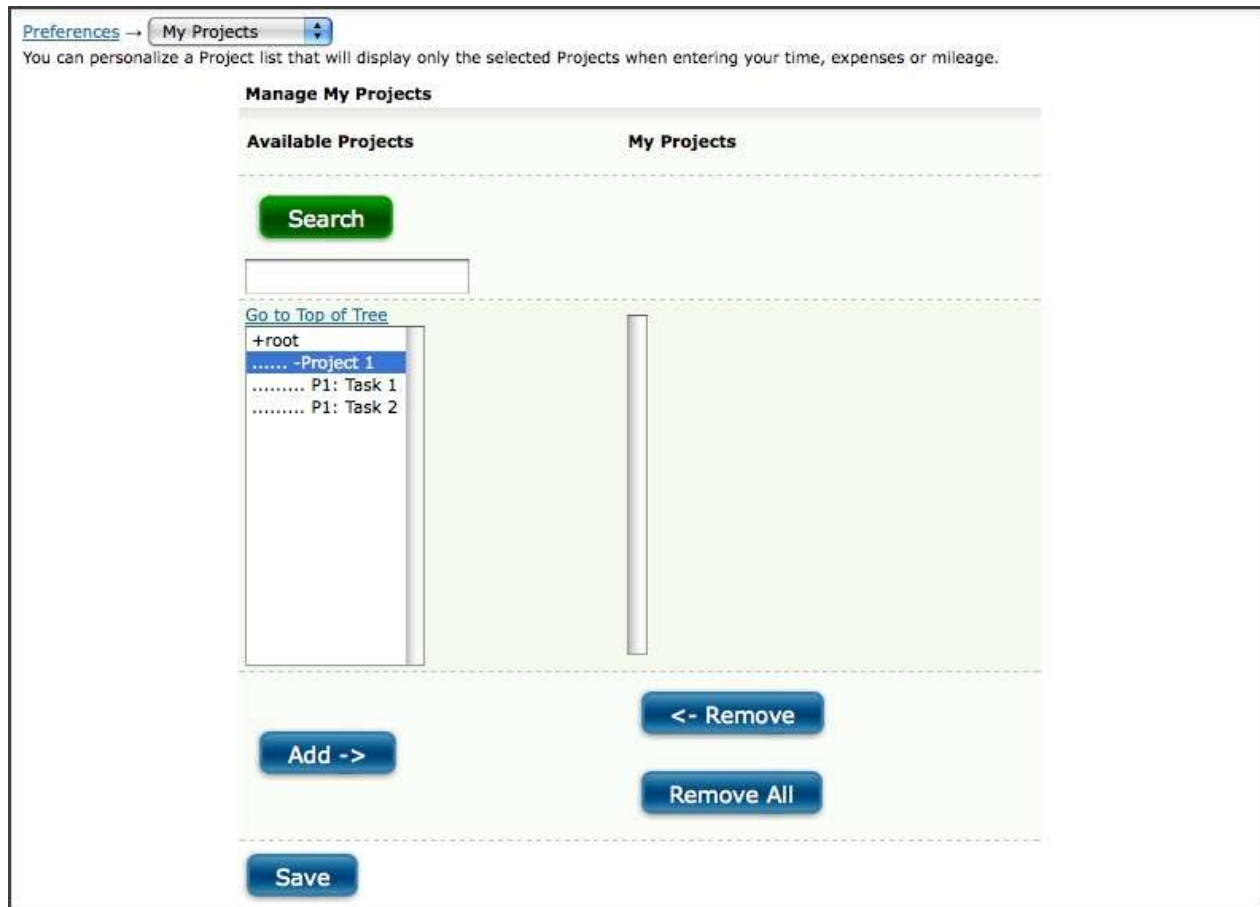


Figure 27.3. My Projects

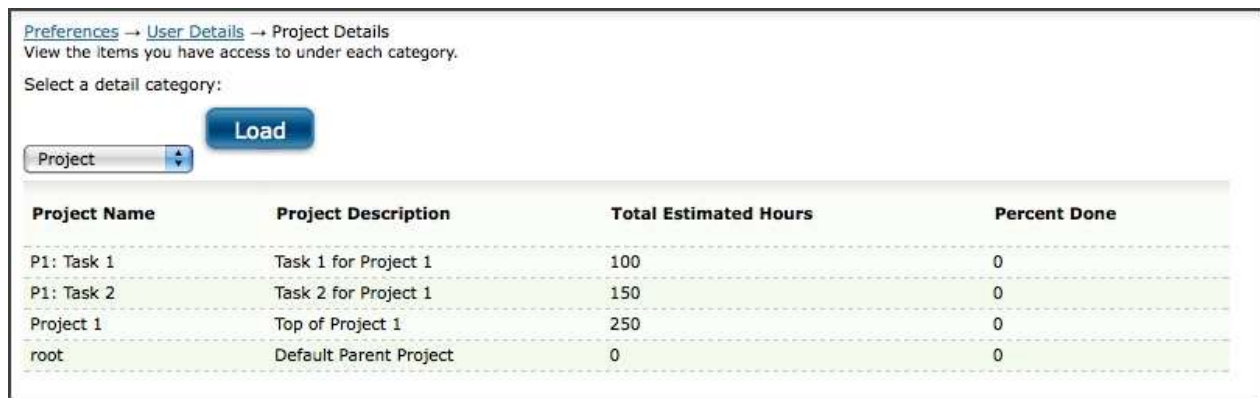
This feature allows you to maintain your own unique list of projects that will be displayed by default in the project dropdown. This will keep you from having to routinely search for or select a project from the project tree for projects that you frequently log hours to. The My Projects link, located at the bottom of each sheet will launch a pop-up window that can be used to add and remove projects from your unique Project List. You may add projects from the Available Projects list by selecting the project and clicking the Add button. These projects will be added to your Project List shown in the box to the right. To remove a project from your Project List, select the project and click the Remove button. Additionally, you can search for a project by specifying the project name or part of the project name. The search results will be displayed in the listbox on the left. If you want to view the full tree instead of the search results, you can

click the Go to Top of Tree link located above the left listbox. When you are finished adding and removing projects from the Projects List, click the Save button.

User Details

User Details is located under Preferences→User Details (see figure 27.4).

Your administrator has added you to groups that will allow you to track time and expenses for certain projects. User Details displays all the groups, projects, and other system information that you have access to. To view your access information, select the Category Type and click the Load button. This will refresh the screen with all the items to which you have access.



Preferences → User Details → Project Details
View the items you have access to under each category.
Select a detail category:

Project Load

Project Name	Project Description	Total Estimated Hours	Percent Done
P1: Task 1	Task 1 for Project 1	100	0
P1: Task 2	Task 2 for Project 1	150	0
Project 1	Top of Project 1	250	0
root	Default Parent Project	0	0

Figure 27.4. User Details

Landing Page

Landing Page is located under Preferences→Landing Page.

The Landing Page preference allows you to override the system default for the screen you first view after logging in. All accounts have default landing pages that are based on the authority and abilities included in their roles. The Landing Page preference allows you to change from the default to another screen which you have access to. The Landing Page screen selections are the same as the list of links you see on your Sitemap. You may choose from any of these screens by selecting one and clicking on Save button. Your selection will remain highlighted. If you wish to remove the selection and return to the default landing page, you can simply click on the Remove button.

The only exception to the selected landing pages overriding the defaults applies to approvers with the Approver-Regular ability. These approvers will see the Approvals tab as their landing pages when sheets are awaiting approval in their queues. If an approver has no outstanding approvals, the selected landing page will be displayed upon login.

Reports

Standard Reports

The reporting functionality is located under the Reports menu. The main reporting sections are Standard Reports, Scheduled Reports, Saved Reports, and System Reports. Depending on your system configuration, you may only have access to some of these reporting sections.

Standard Reports is located under Reports→Standard Reports (see figure 28.1).

Reports → Standard Reports

Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Activities, Pay Types , Bill Types, etc.

Search

Report name contains

Report type is anything

Search

Run Report Options

HTML (regular)

☒ Display report in browser only

☐ Display report in browser and save report output

☐ Save report output only (don't show in browser)

Saved report output description:

Search Results

Showing 1 - 4 of 4 reports

Results Per Page: 10 Go

Report Name	Run Report	Report Type	User Modifiable	Data Range Dates
<input type="checkbox"/> Actual Vs. Estimate	Run Report	Project Status Report	Yes	1 month
<input type="checkbox"/> ExpenseDetails: User	Run Report	Expense Report	Yes	1 month
<input type="checkbox"/> timesheet	Run Report	Time Report	Yes	1 week
<input type="checkbox"/> Total Cost Report	Run Report	Total Cost Report	Yes	1 week

0 selected [Select All](#)

Results Per Page: 10 Go

Delete

Copy to User

Report type: Matrix Time Report

Create

Figure 28.1. Standard Reports

Running a Report

To run a report, you must select the output format for that report. There are four main output formats for time and expense reports:

HTML Reports

HTML Reports display the data as web pages that are optimized for screen display and viewing.

HTML Printable

HTML Printable reports are similar to HTML Reports but have been optimized for printing purposes.

Plain Text (Exported)

Plain Text (Exported) reports produce output which has been designed to be saved to your computer's hard drive and then imported into Excel or another spreadsheet-based data manipulation program.

Cube Reports

Cube Reports are designed for use with Microsoft Office and Microsoft Internet Explorer. To access system data in the Cube Report format, you must use Internet Explorer 5.5 (or later) and have Microsoft Office 2000 (or later) installed on your Windows OS machine. Furthermore, you must have the Office Web Components module installed on your machine. Finally, Internet Explorer must be configured to access data sources across domains. For help configuring this IE security option, please contact your organization's IT department. Unless these prerequisites are met, Cube Reports will not function.

When you run a report, you will be able to select the format of that report. Each of these report formats are further described in detail below.

Once you have selected the report to run and have indicated which report output format you desire, simply click the Run Report link next to the selected report. If the report has been given a specific run date, the system will generate the report and display it in your browser window. If the report has been created to request a date range, the system will display the Report Date Entry screen.

This screen is used to select the dates that will be covered by the report being run. The default begin date for reports is the first day of the previous month. The default end

date for reports is the last day of the current month. To change these dates you may either enter a date manually using 'mm/dd/yyyy' format, use the popup calendar by clicking the Calendar icon next to the field, or use one of the date shortcuts in the select lists below the fields.

When running a report that will request a date range, you may choose to run the report for either a date range or an interval. If you choose to run the report for a date range, simply enter the start and end dates that you want the report to cover. If you choose to run the report on an interval, select the start date for the report and then use the length and interval dropdowns to select the interval that you would like the report to cover.

Because of the immense variety of default reports that ship with the system, this manual does not provide specific information on each report. The manual and online help for the system focuses on the processes of using reporting in the system. The following sections discuss the various output formats and will show several different reports as examples.

HTML Reports

The default output format for reports is the HTML Report format. This format uses the web-based nature of the system itself to produce a report that is simple to read and matches the product's look and feel. Every report in the system, from the standard default reports to any custom report created by any user, can be displayed as an HTML Report. Furthermore, the HTML Report display screen contains the following tools for use with these reports:

The Past Period Button

Clicking this button will make the timeframe of the report move back in time one period. 'Period' is defined as the period selected in the report. Therefore, if the period is a month, the report timeframe will move back in time one month. Clicking the Button again will move the report timeframe back another period.

The View as Button

This button and its associated drop down menu allow you to view the current report in one of the other report formats (HTML Printable, Plain Text/Exportable, Cube Report). Simply select the format you would like the report to be displayed in and click the Button. The system will then display the current report in the specified format.

The Commit Button

Clicking this button will commit all records shown in the current report. Committed records are records that have been closed to modification purposes, i.e., users cannot modify or delete records that have been committed. You should exercise caution when using this Button, especially if you are using one of the system's approval processes. In general, the Commit button is used to approve individual records when no formal workflow approval process is being used. Clicking this button will close the current report and return you to the Main Report Menu, where the system will display a green text message confirming the number of records that were committed. The Commit button is displayed in reports based on a system setting to show or hide the button. If Sheet Approval Plans are in use, Journyx does not recommend using the Commit functionality in conjunction with workflow approvals.

The Future Period Button

Clicking this button will make the timeframe of the report move forward in time one period. 'Period' is defined as the period selected in the report. Therefore, if the period is a month, the report timeframe will move forward in time one month. Clicking the Button again will move the report timeframe forward another period.

HTML Printable Reports

The second standard report output format is the HTML Printable report. This format, which is easily viewable on screen, is designed to be printed. The look and feel of the product has been stripped away in this report format, leaving a simple table appearance. To print a report in this format, simply use your browser's Print function. The report will be printed as it appears on the screen. This format is particularly useful for keeping hard copies of reports. It can also be used by individual employees in conjunction with the My Timesheet report to generate a faxable timesheet.

Plain Text (Exported) Reports

The system also includes the Plain Text (Exported) report format, which is designed for producing data that can be saved to your computer's hard drive and then imported into another program, such as Microsoft Excel, for data manipulation. When you run a report using the Plain Text (Exported), the system will display the data as a tab-delimited file. From the report output screen, you should use your browser's Save As command to save this data to your computer.

By default, the file name will have a .pyc extension. This is simply the name of the file that the system uses to generate the report output.. You may leave the .pyc extension as part of the file name or you may change that extension. In any case, the resulting file will simply be a tab-delimited text file that you may then import.

Cube Reports

Cube Reports contain a dynamic report output form that allows you to sort and view your data. Cube Reports make use of Excel Pivot Tables. Therefore, the computer that you are using to view Cube Reports must have a Windows operating system with Microsoft Office 2000, including the Office Web Components module, or later installed. Additionally, you must use Internet Explorer 5.5 or later to view Cube Reports successfully. Finally, Internet Explorer must be configured to access data sources across domains. For help configuring this IE security option, please contact your organization's IT department.

Cube Reports allow you to view your data within your browser as an Excel Pivot Table. Microsoft Pivot Tables make it easy to change the subtotal options of a given report in real time. Furthermore, you can sort your results or hide individual users, dates, tasks and the like. Finally, The Cube Report format also allows you to export the results of a

specific report directly to Excel, where you can have complete control over the data to make graphs or drill down further.

Hint: When you export a Cube Report from Timesheet into Excel, the complete selection of raw data covered by that report is also exported - usually to Sheet 2 in the workbook which is created during the export process.

Interaction with the data presented in a Cube Report is handled via the Cube Report Toolbar. Additional help with the pivot table technology behind Timesheet's Cube Reports can be accessed by clicking the Help button.

To modify the subtotal option dynamically, click the Field List button on the report toolbar. The Field List screen will be displayed and you will be able to select additional fields to show in the report. Initially, only the fields that are included in the report are displayed in the report. However, by default, all standard fields will be listed in the Field List Screen and are able to be added to the active Cube Report. Simply drag the desired field from the Field List screen to the Filter Fields portion of the Cube Report. The system will automatically re-subtotal the report based on the choice you make.

To export the data displayed by a Cube Report to Excel, click the Export to Excel button on the report toolbar. You may receive a security warning from IE indicating that the data you are about to transfer is located in another domain. If you receive this warning, you may safely click 'Yes' to continue. Once the data has been imported to Excel, you may work with it independently of the system. Please note that running a Project Status Report as a Cube Report is a special case because the hierarchical nature of this report cannot be represented accurately in Excel. Therefore, this report in this format cannot be represented well as a Cube Report. The WBS field shown in this report combination is a numerical representation of the hierarchy. Journyx has included the ability to run this report combination so that you may easily export the data contained within a Project Status Report directly into Excel. If you are unfamiliar with Pivot Tables or need further information on this subject, please see the Microsoft web site or your organization's Excel documentation for additional assistance.

Saved Reports

You can save the output of a report with a fixed date range for later viewing. Saved reports can also be copied to other users or even emailed to other individuals, even if they are not Timesheet users. The following section describes all of these functions.

Saving Reports

To save a report in Timesheet, select either 'Display report in browser and save report output' or 'Save report output only' without displaying in browser (see figure 28.2). Additionally, you must designate a name for the saved report for identification purposes. By default, the system will name the output file with same name of the Saved Report. You may change this name. The last option determines when the saved report will expire and be automatically deleted from the system. Saved report expiration defaults to 3 months, but you can change the expiration to suit your needs.

Reports → **Standard Reports**

Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Activities, Pay Types , Bill Types, etc.

Search

Report name Report type

Search

Run Report Options

☒ Display report in browser only

☐ Display report in browser and save report output

☐ Save report output only (don't show in browser)

Saved report output description:

Expire saved report output if not viewed for:

Search Results Showing 1 - 4 of 4 reports Results Per Page:

Report Name	Run Report	Report Type	User Modifiable	Data Range Dates
<input type="checkbox"/> Accruals	Run Report	Time Report	Yes	1 year
<input type="checkbox"/> ExpenseSummary:User	Run Report	Expense Report	Yes	1 month
<input type="checkbox"/> Summary of Hours:User	Run Report	Time Report	Yes	1 month
<input type="checkbox"/> timesheet	Run Report	Time Report	Yes	1 week

0 selected [Select All](#) Results Per Page:

Delete **Copy to User** **Report type:** **Create**

Figure 28.2. Creating Saved Reports

Once you have selected the report format, chosen the method for saving and specified the name, click the Run Report link next to the selected report. The report will run and the output will be saved for later viewing. Please note that the report data is saved at the time you run the report. Therefore, any modifications you may make to the report after it has been run (i.e., changing the subtotalling options when using a Cube Report) will not be saved. To save reports that have been modified after the initial run, export the report data to Excel or another similar program.

Existing Saved Reports can be seen by navigating to Reports→Saved Reports (see figure 28.3). The list of saved reports, located at the top of this screen, includes all reports that you have saved, as well as any saved reports that have been copied to you by another user within your organization. This screen includes the following information on each saved report you, as a user, have access to: report name, date run, report type, output format, and file size. This screen also provides access to the tools needed to copy or email saved reports to other users both within and outside the system database. To view a previously Saved Report, simply select the report you wish to view from the list of Saved Reports and click the View button.

[Reports](#) → **Saved Reports**

Report output can be saved for later viewing. Saved reports can also be copied to other users or emailed externally.

Previously Run Reports for meredith

Select	Description	Date Run	Report Type	Output Format	File Size
<input type="radio"/>	Timesheet Report Week of Aug 6	Monday, July 26, 2010 at 11:28 AM CDT	Time Report	HTML (regular)	27.234 KB

View **Delete**

Rename

Copy to

1, pm
1, u
2, u
3, u
meredith

Select User(s) Type in e-mail address(es).

E-mail to

1, pm
1, u
2, u
3, u
meredith

Figure 28.3. Saved Reports

Copying a Saved Report to Timesheet Users

You can copy your saved reports to other users within your organization. To copy a report to another user, select the report you wish to copy from the list of saved reports. You may then select one or more users shown in the listbox. You can select multiple users by using ctrl-click or shift-click. Once you have selected the user(s) you wish to copy this Saved Report to, click the Copy To button. When copying a single report to other users, you will be able to rename the report for those users. However, when copying multiple reports to users, you will not be able to rename the report for those users.

Emailing a Saved Report

Saved Reports may be emailed to anyone with a valid email address. Before you can email a saved report, the system requires the following items be established in the system:

- Email System Settings
- Fully qualified domain name of server
- SMTP mail server name
- Custom Fields
- Your email address
- Email address of recipient

Without your email address and the System Settings configured, you will be unable to email any Saved Reports. Additionally, you will not be able to email Saved Reports to other users who do not have an email address entered for them in the Custom Fields section of Timesheet. For these users, as well as anyone who is not a user within your organization's Timesheet installation, you may manually enter email addresses in the textfield located to the right of the user listbox. Email addresses entered into this field may be separated by commas, semicolons or carriage returns. You may also utilize the User listbox and the email text entry field in combination. Once you have selected the Saved Report you wish to email and have indicated which users or email addresses you would like to send the selected report to, click the Email To button. If any users you selected from the user listbox do not have an email address entered in the Custom Fields, the system will display a red text error message indicating which users were not sent the Saved Report. Emailed Saved Reports arrive as attachments within the email itself. The format of the attachments varies depending on the output format of the saved report that was mailed. HTML Reports arrive as plain HTML files that contain the contents of the report. These function exactly like HTML reports as discussed above. HTML Printable reports arrive as plain HTML files that contain the contents of the report. These function exactly like HTML Printable reports as described above. Cube Reports arrive as an HTML file and an XML file that combine to create the Cube Report. These function exactly as Cube Reports as discussed above, including the limitations associated with this report format. Plain Text (Exported) reports arrive as a tab-delimited .txt file that contains the contents of the report. These files can be imported into Excel or another similar program.

If you encounter difficulties emailing Saved Reports because either the Email System Settings have not been set for your organization's installation of Timesheet or because you or your intended recipients do not have email addresses defined within Custom Fields, please contact your system administrator to correct these issues.

Administrator Management of Saved Reports

Administrators have some additional options on the Saved Reports screen.

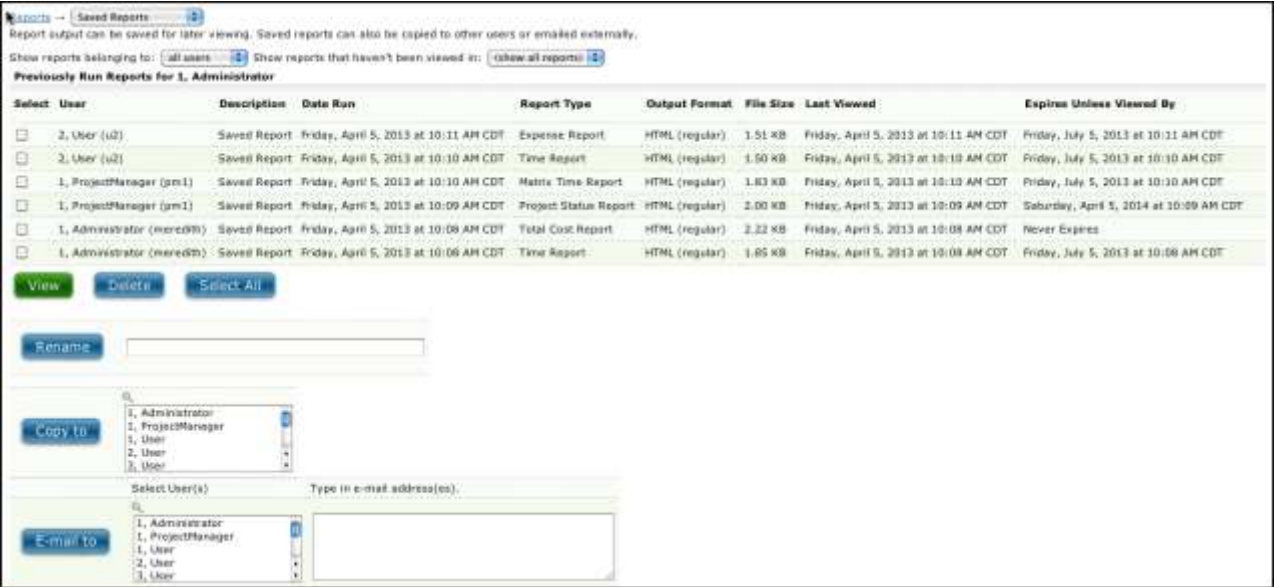


Figure 28.3.1 Saved Reports for Administrators

Administrators have the option to view saved reports for all users in the system, and they can use their Saved Reports area to delete old reports and clear up space on the Journyx server. The select list at the top on the left side allows Administrators to view their own saved reports or saved reports for all users. The select list at the top on the right allows Administrators to see when saved reports were last viewed by anyone in the system. Reports with expiration dates will be deleted from the system if they are not viewed before the expiration date. If a report is viewed by someone, the expiration date will be reset. Expiration dates are set by the user when saving the report. All of these options allow Administrators to ensure that the Journyx server doesn't get cluttered with old and unused saved reports.

Scheduled Reports

Scheduled reporting is located under Reports→Scheduled Reports (see figure 28.4).

You can schedule reports to run automatically at specific times. This feature can be used in any number of ways, though the most common reason for scheduling reports is to arrange for large reports to run at times of low traffic. The Scheduled Reports Screen provides access to all the tools needed to schedule reports to run at specific times, dates or intervals. This screen is used to schedule one report at a time. The basic process of scheduling a report is outlined below and the details on each schedule type are provided in the following section.

Figure 28.4. Scheduled Reports

To schedule a report, select the report you wish to schedule from the dropdown list. Then select the output format of the scheduled report. Enter a description for the scheduled report. Select the schedule type for the scheduled report. Select the Schedule Options for the scheduled report. Enter a start date for the scheduled report (One-Time Reports and Bi-Weekly Reports only). Enter a time of day for the scheduled report to run. Once you have completed these steps, click the Schedule New Report button. The system will refresh the Scheduled Reports Screen and display a green text message indicating that the report has

been scheduled. Additionally, the newly Scheduled Report will be added to the list of existing Scheduled Reports located at the top of the Scheduled Reports Screen.

To modify an existing Scheduled Report, click the report you wish to modify from the list of existing Scheduled Reports. You will then be able to modify whichever options you wish to change for the Scheduled Report. Once you have completed these steps, click the Save button. The system will refresh the Scheduled Reports Screen and display a green text message indicating that the report has been modified.

To delete an existing Scheduled Report, simply select the report you wish to delete and click the Delete button. The system will display a warning asking you to confirm the deletion of the Scheduled Report.

Schedule Types

One Time

A One Time report is a report that is run exactly once on a specific day at a specific time. The only settings required for a One Time report are the date and time at which you wish the report to run. When scheduling a One Time report, simply indicate the date of the report in the Start Date text box and select a time for the report to run on that date using the Run Time of Day dropdown.

Daily

Daily reports are reports that are scheduled to run at a specific time on a daily basis. When scheduling a Daily report, you will need to select whether the report is to run every day or on weekdays only. Additionally, you will need to select a time for the report to run on that date using the Run Time of Day dropdown.

Weekly

Weekly reports are reports that are scheduled to run once a week on a specific day of the week. Weekly reports may be set to run on one or more days of the week each week. When scheduling a Weekly report, you will need to indicate which day(s) you want the report to run by selecting the day(s) in the Schedule Options section. To select more than one day, ctrl-click or shift-click the individual days you want to select. Additionally, you will need to select a time for the report to run on that date using the Run Time of Day dropdown.

Bi-Weekly

Bi-Weekly reports are reports that are scheduled to run every other week on a specific day of the week. Bi-Weekly reports may be set to run on one or more days of the week each week. When scheduling a Bi-Weekly report you will need to indicate which day(s) you want the report to run by selecting the day(s). To select more than one day, ctrl-click or shift-click the individual days you want to select. You will also need to indicate a start date for the Bi-Weekly report. The start date for a Bi-Weekly report is used to determine the first day on which the report will be run. The report will not run on chosen days of the week that fall before the start date until the next bi-weekly cycle has begun. Finally, you will need to select a time for the report to run on that date using the Run Time of Day dropdown.

Monthly by Day

Monthly by Day reports are reports that are scheduled to run on a specific 'soft' date such as 'the first Monday of the month' or 'the third Wednesday of the month'. To schedule a Monthly by Day report, you will need to select which 'period' of the month (1st, 2nd, 3rd, 4th, or 'last') you would like the report to target. You must then select the day of the week on which you would like the report to be run. Please note that you may select only one 'period' for any given report. You may, however, select any number of days within that 'period' for the report to be run. Therefore, you could schedule a report to run on the 3rd Monday and 3rd Thursday of each month with only one scheduled report. Finally, you will need to select a time for the report to run on that date using the Run Time of Day dropdown.

Monthly by Date

Monthly by Date reports are reports that are scheduled to run on specific dates of each month such as 'the 3rd' or 'the 21st'. Monthly by Date reports can be scheduled to occur on more than one date each month. To schedule a Monthly by Date report you will need to select the date(s) that you want the report to run by selecting the day(s). To select more than one date, ctrl-click or shift-click the individual days you want to select. Additionally, you will need to select a time for the report to run on that date using the Run Time of Day dropdown. The 'last' date of any month is truly the final day of that month. Timesheet has been designed to understand that not all months have the same number of days. Therefore, you may schedule a report for the 'last' day of the month and Timesheet will run the report on the 28th, 30th, 31st, etc. as deemed appropriate. Additionally, Timesheet has been configured to apply the same understanding to reports that are scheduled for the 31st and 30th - these reports will be run on the last day of the month if the 30th or 31st is not relevant for that month.

System Reports

System Reports are located under Reports→System Reports (see figure 28.5). The system incorporates the ability to run reports on individual aspects of your Timesheet configuration, allowing you to get a 'big picture' view of the information contained within. With the System Reports, you can easily see which Users have access to which Projects, which Tasks are contained in which Groups, which Approvers are associated with which Mileage Approval Plans, and nearly any other combination of internal data.

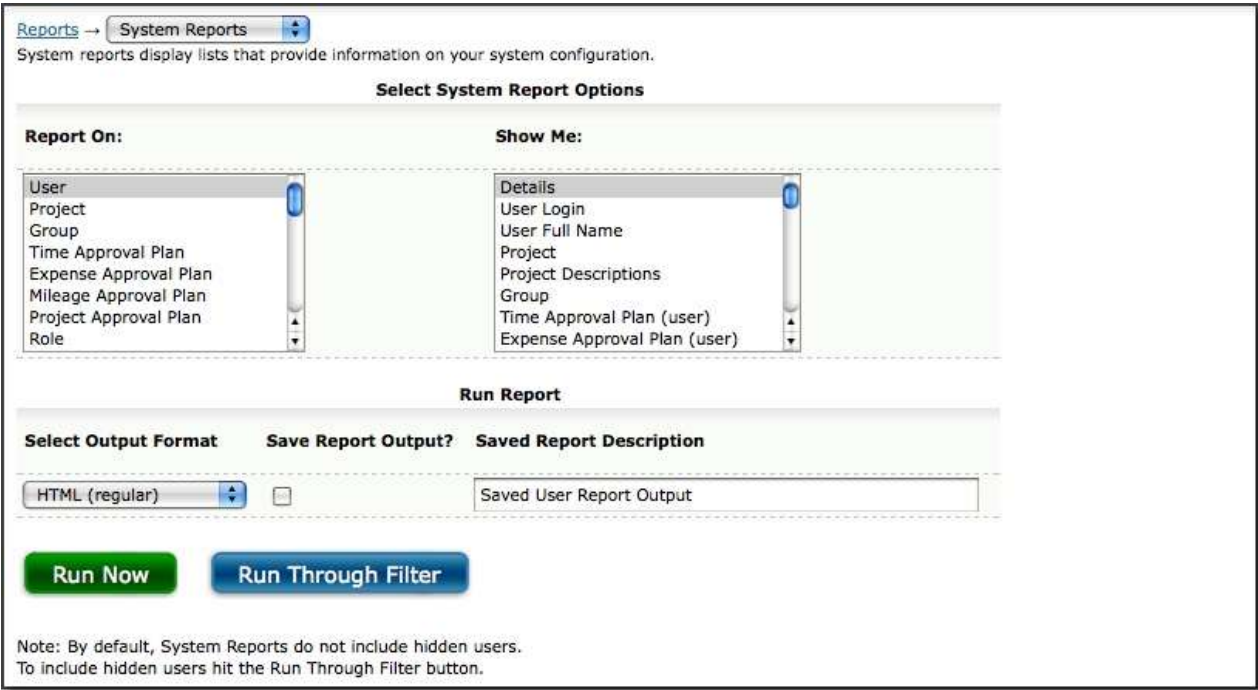


Figure 28.5. System Reports

Timesheet's System Reports function provides a number of views of the information contained in the system database. To run a System Report you simply need to select the item on which

you would like the report to be run and then indicate which associated items you would like to have shown in the report itself. The available items for reporting are the following:

- Users
- Projects
- Groups
- Time Approval Plans
- Expense Approval Plans
- Mileage Approval Plans
- Project Approval Plans
- Roles
- Time Entry Screens
- Expense Entry Screens
- Mileage Entry Screens
- Punch/Start-Stop Entry Screens
- Policies
- Time Entry Periods
- Expense Entry Periods
- Mileage Entry Periods
- Tasks
- Pay Types
- Bill Types
- Expense Codes
- Currencies
- Sources
- Measurements
- Vehicles
- Reasons
- License Report

Each reportable item has one or more associated items that can be selected for reporting purposes. You may select as many of these associated items as you choose from the Show Me list. You can use shift-click or ctrl-click functionality to select multiple items to show in the report. Once you have made your reporting selections, choose a report output format for the report. Before you run the System Report, you may choose to save the report output by checking the Save Report Output checkbox on this screen. If you intend to save the report output, you are encouraged to specify a more detailed Saved Report Description on this screen as well.

To run the System Report that you have designed, click the Run Now button. The system will open a new window containing the results of your System Report. You may close this window when you are finished. If you have chosen to run this System Report in the Plain Text (exported) format, you should print this report out before closing the window.

Filters and System Reports

You can apply a limited set of filters to System Reports to provide even more filtered and detailed results. If you wish to run a System Report with a filter, select the criteria of your report as outlined above, including your desire to save the report output, and click the Run

Through Filter button. Timesheet will display the System Reports Filter Screen (see figure 28.6).

[Reports](#) → [System Reports](#) → System Report Filter Screen
System reports display lists that provide information on your system configuration.

Limit User(s) shown in report.

Choose Mechanism	Select User(s)
<input checked="" type="radio"/> All active and inactive User(s) <input type="radio"/> Only Selected User(s) <input type="radio"/> All Except Selected User(s)	<input type="text" value="1, pm"/> <input type="text" value="1, u"/> <input type="text" value="2, u"/> <input type="text" value="3, u"/> <input type="text" value="meredith"/>

☐ Include Hidden Users (required for hidden users, even if they are manually selected)

Limit Details shown in report.

Choose Mechanism	Select Details
<input checked="" type="radio"/> All Details <input type="radio"/> Only Selected Details <input type="radio"/> All Except Selected Details <input checked="" type="radio"/> Use User-Friendly Report Headings <input type="radio"/> Use System Report Headings (for data export)	<input type="text" value="Login Name"/> <input type="text" value="Roles"/> <input type="text" value="Number of Input Records"/> <input type="text" value="Full Name"/> <input type="text" value="Initial Comment"/>

Run Report

Figure 28.6. System Report filters

This screen provides access to the tools needed to apply a filter to your System Report. System Report filters allow you to limit the scope of the report to show data in one of the following manners:

- All - this option is equivalent to running the System Report without a filter at all.
- Only Selected - this filter will constrain the report to show only data regarding the item(s) selected in the Selected column.
- All Except Selected - this filter will constrain the report to show only data regarding the item(s) not selected in the Selected column.

You may select multiple items in the Selected column by ctrl-clicking or shift-clicking each item individually.

Once you have configured the System Report filter, click the Run Report Button. This will open a new window containing the results of your filtered System Report. You may close this window when you are finished. If you have chosen to run this System Report in the Plain Text (exported) format, you should print this report out before closing the window.

Creating a New Report

The product ships with a number of default reports that should fit the needs of most users and organizations. However, Timesheet also includes a complete suite of report creation tools so that reports can be customized (see figure 28.7).

Reports → Standard Reports

Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Activities, Pay Types , Bill Types, etc.

Search

Report name contains

Report type is anything

Search

Run Report Options

HTML (regular)

☒ Display report in browser only

☐ Display report in browser and save report output

☐ Save report output only (don't show in browser)

Saved report output description: Saved Report

Search Results

Showing 1 - 4 of 4 reports

Results Per Page: 10

Go

Report Name	Run Report	Report Type	User Modifiable	Data Range Dates
<input type="checkbox"/> Actual Vs. Estimate	Run Report	Project Status Report	Yes	1 month
<input type="checkbox"/> ExpenseDetails: User	Run Report	Expense Report	Yes	1 month
<input type="checkbox"/> timesheet	Run Report	Time Report	Yes	1 week
<input type="checkbox"/> Total Cost Report	Run Report	Total Cost Report	Yes	1 week

0 selected

[Select All](#)

Results Per Page: 10

Go

Delete

Copy to User

Report type: Matrix Time Report

Create

Figure 28.7. Standard Reports

The first thing you must choose when creating a new report is the Report Type for the new report (see figure 28.8). Report Type defines the general functionality of the report. This report parameter is described in detail below.

Report type: Matrix Time Report

Create

Figure 28.8. Report type selection

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Report Types

The system divides the default reports into four main categories:

- Line Item Reports
- Matrix Reports
- Project Status Reports
- Total Cost Reports

Additionally, the system allows you to select between Time and Expense subtypes of both Line Item Reports and Matrix Reports. Each Report Type as well as the two subtypes have certain parameters that you may use to configure the reports. Each of these sets of parameters is discussed below.

Once the report type has been selected, you will be directed to the Create Report screen for that specific report type (see figure 28.9 and 28.10).

Reports → Standard Reports → Create Time Report

Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Activities, Pay Types , Bill Types , etc.

Report name:

☒ Allow users to modify this report after it is copied to them.

Report Dates

☐ Prompt for date entry when report is run

☒ Run for

Weeks start on:

Project Filters

☒ Include all Project(s)

☐ Include only selected Project(s)

☐ Include all except selected Project(s)

Available Project

P1: Task 1

P1: Task 2

Project 1

root

Add

Remove

Selected Project

☐ Automatically include Project descendants in report?

Activity Filters

☒ Include all Activity(s)

☐ Include only selected Activity(s)

☐ Include all except selected Activity(s)

Available Activity

Clerical

Coding

CorpAdmin

Debugging

Design/Plan

Add

Remove

Selected Activity

Pay Type Filters

☒ Include all Pay Type(s)

☐ Include only selected Pay Type(s)

☐ Include all except selected Pay Type(s)

Available Pay Type

Family Leave

Invalid

Add

Selected Pay Type

Figure 28.9. Report creation options

Report Output Options

Show subtotal for every Weeks

Second, subtotal by:

Third, subtotal by:

Fourth, subtotal by:

Only show rows associated with the attribute subtotals if amounts are

Display note

☒ Show grand total
☐ Show rows containing zero days and zero subtotals
☒ Combine similar records into a single row
☒ Show details

Fields to display in report

Available Fields:

Fields displayed in report:

☒ Show users's column names from Entry Screen Configuration.

Additional header HTML:

Additional footer HTML:

Figure 28.10. Report creation options (continued)

General Report Options: Line Item Reports and Project Status Reports

Line Item Reports and Project Status Reports share the same general report options. Each of these options is outlined below.

Date Ranges for Reports

All reports are designated as either reports that will request a date range or reports that will run on a specific dates. This portion of the report creation screen allows you to select which date range style you would like to use for your new report.

Reports that will request a date range will allow you to define the date range each time you run the report. When you run such a report, the system will ask you for the date range for the report to cover before returning data. Otherwise, the report will run for a specific range of time

as defined from the date specification criteria. When you run such a report, the system returns data based on the period interval that has been defined for the report when the report was created. If you chose to create a report that will request a date range, you may then move on to the next step in report creation; however, if you choose to create a report to run on a particular interval, you must provide details on the date period before continuing to the next step. When creating such a report, you will need to choose a Length and Increment Type for the report. Report Lengths are a number between .25 and 365 as defined in the Length dropdown menu. Report Increments are standard time periods - day, week, month, and year. The output of such a report is based on the length/increment chosen at this point. Therefore, you could create a report that covers 90 days or one quarter (.25) year or nearly any combination of length/increment. Obviously, certain combinations of length/increment are more useful than others. After indicating the Length of the new report, you must also define a Start for the report. The Start tells the system exactly where the report should begin when returning data. The system requires either a 'day of the week' or a combination of 'day of month' and a 'month of year' to function. A 'day of the week' must be selected for a report that has been configured with a length of one week or less. Reports that have been defined with a length of greater than one week must have a combination of 'day of month' and a 'month of year' established.

Primary Filters

You are able to apply certain filters to newly created reports. These filters may be used to target the report output to specific Projects, Tasks, Pay Types, Bill Types and Users. The process of using the report filters in the system is relatively straightforward. For each filter category, you may choose to have the system show the following range of each item:

- All - this option is equivalent to running the report without a filter on this item.
- Only Selected - this filter will constrain the report to show only data regarding the item(s) selected in the Selected column for this item.
- All Except Selected - this filter will constrain the report to show only data regarding the item(s) not selected in the Selected column for this item.

You may select multiple items in the Selected column by using ctrl-click or shift-click functionality.

Additionally, you may choose to show data associated with all of the selected projects' descendants by checking the 'Automatically Include Project Descendants in Report?' option at the bottom of the Project Filter section.

Item Status Filter

The Item Status Filter works in the same manner as the Primary Filters described above. This filter allows you to filter your report to records that meet certain status requirements. The status requirements for use with this filter are, effectively, four pairs of possible record statuses. Any one of these pairs may or may not apply to your organization, depending upon how you are using Timesheet.

The first pair of status filters relates to the Approval Status of records in relation to the standard sheet approvals. For more information on the standard sheet approvals process, please see the Approvals section of this manual. 'Approved/Committed' filters records that have been approved using the standard sheet approvals process. 'Not Approved/Not Committed' filters records that have not yet been approved using the standard sheet approvals process.

The second pair of status filters relates to the Synchronized Status of records in relation to the optional Disconnected User module of Timesheet. If your organization is not using the Disconnected User module, these filters will not apply to your records. For more information on the Disconnected User module, please see the Disconnected Client Module section of this manual. 'Synchronized' filters records that have been synchronized via the Disconnected User module. 'Not Synchronized' filters records that have not been synchronized via the Disconnected User module.

The third pair of status filters relates to the Approval Status of records in relation to the Project Approvals process of the system. For more information on the project approvals process, please see the Project Approvals section of this manual. 'Project Approved' filters records that have been approved using the Project Approvals process. 'Not Project Approved' filters records that have not been approved using the Project Approvals process.

The fourth pair of status filters relates to records that are created in the system via the punch entry process. 'Created from Punch Records' filters records that have been created in the system database from punch records. 'Not Created from Punch Records' filters records that have not yet been created in the system database from punch records.

The Item Status Filter allows you to choose records that have multiple statuses. You may choose any combination of filter items, though obviously some combinations will be more effective than others. When filtering by more than one pair of status filters, the system allows you to choose whether you want your results to be exclusive (OR) or inclusive (AND). Therefore, you can choose to have the report show items that are Synchronized OR Punch Records, or items that are both Period AND Project approved.

User Modification

You are able to copy newly created reports to other users within your organization's Timesheet installation. By default, all newly created reports that are assigned to other users are set to be modifiable by those users. When a user modifies their copy of a report, those changes are not reflected in any other copy of the report. If you are creating a report that you do not want other users to be able to modify, this section allows you to indicate that choice. Simply change this option to 'No' and users who receive copies of this new report will not be able to make changes to the report. They will be able to view the report only as you have designed it.

Header and Footer

The system provides access to the header and footer text that appear on each Timesheet report. These two areas accept plain text as well as HTML formatted text. Additionally, you may use one or more of the Journyx 'tricky tags' in these sections as well. Journyx 'tricky tags' are HTML-style tags that pull specific information directly from the

system database, such as the name of the User who is viewing the report, the name of the Time Entry Screen that is currently active for the viewing user, and similar data.

Tricky Tag

<name>

<authorization>

<reserved>

<number of input records>

<number of output records>

<number of dates>

<full name>

<default comment>

<other options>

<expense entry GUI in use>

<time entry GUI in use>

<domain ID>

<mileage entry GUI in use>

<custom field name>

System Information Displayed

Displays the login ID of the active user

Specifically for use by the Journyx Professional Services team

Specifically for use by the Journyx Professional Services team

Displays the number of blank rows that appear on this time entry screen for the active user; this number may be set globally for the Time Entry screen or may be left to the individual user to specify for himself

Specifically for use by the Journyx Professional Services team

Displays the number of days contained in the time period upon which this time entry screen is based

Displays the full User Name of the active user

Displays the default comment that the active user has defined under his preferences tab

This tag is specifically for use by the Journyx Professional Services team

Displays the name of the Expense Entry screen assigned to the active user

Displays the name of the Time Entry screen assigned to the active user

Displays the name of the Domain that contains the active user

Displays the name of the Mileage Entry screen assigned to the active user

Displays the name of the contents of the named User Custom Field. For instance, if you want to show the contents of the user's custom field "Employee Number" then use the tag <Employee Number>. Likewise, in order to use the "Email Address" field you can use the tag <Email Address>.

Please note that if you have renamed any of the default custom fields such as renaming "Email Address" to "E-mail" then you must use the renamed field name in the tag. If the user does not have a value set for that Custom Field then the tag will be replaced with a blank value. Any custom field with the same name as one of the standard tags mentioned above will be ignored. Any custom fields with Visibility set to Hidden will not show up. The user must also be assigned a role that is allowed to report on the custom field.

General Report Options: Expense Reports

Expense Reports have a slightly different set of general options than those associated with Time Reports and Project Reports. All of the general report options for expense reports are outlined below (see figure 28.11).

Reports → Standard Reports → Create Expense Report

Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Activities, Pay Types , Bill Types, etc.

Report name:

☒ Allow users to modify this report after it is copied to them.

Report currency:

Report Dates

☐ Prompt for date entry when report is run

☒ Run for

Weeks start on:

Mileage Records

☒ Include Mileage Records in Expense Report?

Project Filters

☒ Include all Project(s)

☐ Include only selected Project(s)

☐ Include all except selected Project(s)

Available Project

Selected Project

☐ Automatically include Project descendants in report?

User Filters

☒ Include all User(s)

☐ Include only selected User(s)

☐ Include all except selected User(s)

Available User

Selected User

Expense Code / Reason Filters

☐ Include

☐ Exclude

Figure 28.11. Expense Report

Date Ranges

All reports in Timesheet are designated as either reports that will request a date range or reports that will run for a particular period interval. This portion of the report creation screen allows you to select which date range style you would like to use for your new report. Reports that will request a date range are run for an amount of time relative to the date on which you run the report. When running such a report, the system will ask you for the date range for the report to cover before returning data. Reports that will run for a particular period interval are run for a specific period interval as defined within the report itself. When you run such reports, the system returns data based on the period that has been defined for the report when the report was created. If you chose to create reports that will request a date range, you may then move on to the next step in report creation; however, if you choose to create a report that will run on the specified period interval, you must provide details on the period before continuing to the next step. When creating such a report, you will need to choose a Length and Increment Type for the report. Report Lengths are a number between .25 and 365 as defined in the Length dropdown menu. Report Increments are standard time periods - day, week, month, and year. The output of such a report is based on the length/increment chosen at this point. Therefore, you could create a report that covers 90 Days or one quarter (.25) year or nearly any combination of length/increment. Obviously, certain combinations of length/increment are more useful than others. After indicating the Length of your new report, you must also define a Start for the report. The Start tells the system exactly where the report should begin when returning data. The system requires either a 'day of the week' or a combination of 'day of month' and a 'month of year' to function. A 'day of the week' must be selected for a report that has been configured with a length of one week or less. Reports that have been defined with a length of greater than one week must have a combination of 'day of month' and a 'month of year' established.

Currency Conversion

The system allows you to convert the expense values that will be shown in this report to another currency. This section of the Report Modification screen allows you to select the currency to which these values will be converted. To establish a currency conversion for your new report, simply select the 'output currency' you wish the report to use from the dropdown box located in this section. Please note that you must have a previously established currency conversion in place for this setting to function properly. For more information on currency conversions, please see the Expenses and Currencies portion of this manual.

Primary Expense Filters

You can apply certain filters to newly created reports. These filters may be used to display specific Projects, Users, Expense Codes, Currencies, and Sources. For each filter category, you may choose to have the system show the following range of each item:

- All - this option is equivalent to running the report without a filter on this item.
- Only Selected - this filter will constrain the report to show only data regarding the item(s) selected in the Selected column for this item.

- All But Selected - this filter will constrain the report to show only data regarding the item(s) not selected in the Selected column for this item. You may select multiple items in the Selected column by using ctrl-click or shift-click functionality.

Additionally, you may choose to show data associated with all of the selected projects' descendants by checking the 'Automatically Include Project Descendants in Report' option at the bottom of the Project Filter portion of this section.

Status Filters

☒ Include all Statuses
☐ Include only selected Statuses

☒ OR
☐ AND

Available Status:
 Approved/Committed
 Not Approved/Committed
 Synchronized
 Not Synchronized
 Project Approved

Add
 Remove

Selected Status

Report Output Options

Show subtotal for every: 1 Weeks

Second, subtotal by: Expense Record Fields User

Third, subtotal by: None None

Fourth, subtotal by: None None

Only show rows associated with the attribute subtotals if amounts are greater than 0

Display partial note

☒ Show grand total
☐ Show rows containing zero days and zero subtotals
☒ Combine similar records into a single row
☒ Show details

Fields to display in report

Available Fields: Expense Record Fields, User, Project, Project Description, Expense Code/Reason, Expense Code/Reason Description

Fields displayed in report: User, Project, Expense Code/Reason, Currency, Source/Vehicle, Comment, Record State

Add
 Remove

☒ Show users's column names from Entry Screen Configuration.

Standard journyx.com report header

Figure 28.12. Expense Report creation options (continued)

Item Status Filter

The Item Status Filter works in the same manner as the Primary Filters described above. This filter allows you to target your report to records that meet certain status requirements.

The status requirements for use with this filter are, effectively, four pairs of possible record statuses. Any one of these pairs may or may not apply to your organization, depending upon how you are using Timesheet.

The first pair of status filters relates to the Approval Status of records in relation to the standard Timesheet sheet approvals. For more information on the standard sheet approvals process, please see the Approvals section of this manual. 'Approved/Committed' filters records that have been approved using the standard sheet approvals process. 'Not Approved/Not Committed' filters records that have not been approved using the standard sheet approvals process.

The second pair of status filters relates to the Synchronized Status of records in relation to the optional Disconnected Client module of Timesheet. If your organization is not using the Disconnected Client module, these filters will not apply to your records. For more information on the standard sheet approvals process, please see the Disconnected Client Module section of this manual. 'Synchronized' filters records that have been synchronized via the Disconnected Client module. 'Not Synchronized' filters records that have not been synchronized via the Disconnected Client module.

The third pair of status filters relates to the Approval Status of records in relation to the Project Approvals process of Timesheet. For more information on the project approvals process, please see the Project Approvals section of this manual. 'Project Approved' filters records that have been approved using the Project Approvals process. 'Not Project Approved' filters records that have not been approved using the Project Approvals process.

The fourth pair of status filters is related to records that are created in via the punch entry process. 'Created from Punch Records' filters records that have been created in the system database from punch records. 'Not Created from Punch Records' filters records that have not yet been created in the system database from punch records.

The Item Status Filter may be turned off or on using this section of the Report Modification Screen. You may choose any combination of filter items, though obviously some combinations will be more effective than others. When filtering by more than one pair of status filters, the system allows you to choose whether you want your results to be exclusive (OR) or inclusive (AND). Therefore, you can choose to have the report show items that are Synchronized or Punch Records, or items that are both Period and Project approved.

User Modification

You can copy newly created reports to one or more users within your organization's Timesheet installation. By default, all newly created reports that are assigned to other users are set to be modifiable by those users. When a user modifies their copy of a report, those changes are not reflected in any other copy of the report.

If you are creating a report that you do not want other users to be able to modify, this section allows you to indicate that choice. Simply change this option to 'No' and users who receive copies of this new report will not be able to make changes to the report. They will be able to view the report only as you have designed it.

Header and Footer

The system provides access to the header and trailer text that appear on each Timesheet report. These two areas accept plain text as well as HTML formatted text. Additionally, you may use one or more of the Journyx 'tricky tags' in these sections as well.

Journyx 'tricky tags' are HTML-style tags that pull specific information directly from the system database, such as the name of the User who is viewing the report, the name of the Time Entry Screen that is currently active for the viewing user, and similar data. The complete list of tricky tags and the information that they provide is available in the Time Entry Screen Design portion of this manual.

Specific Report Type Options

Along with the General Report Options discussed above, each new report has a number of options that are associated with the type you have chosen for the report. The report types that are available are:

- Line Item Report
- Matrix Report
- Project Report

The options for the different report types are discussed below.

Line Item Reports

Report Output Options

Show subtotal for every 1 Days

Second, subtotal by: None None

Third, subtotal by: None None

Fourth, subtotal by: None None

Only show rows associated with the attribute subtotals if amounts are greater than 0

Display partial note

☒ Show grand total

☐ Show rows containing zero days and zero subtotals

☐ Combine similar records into a single row

☒ Show details

Fields to display in report

Available Fields

Time Record Fields

UserProjectProject DescriptionActivityActivity Description

AddRemove

Fields displayed in report

UserActivityPay TypeBill TypeProjectComment

☒ Show users's column names from Entry Screen Configuration.

Figure 28.13. Line Item Options

The most versatile report type, Line Item reports provide you with the ability to show many details associated with the individual item for which you are reporting.

The options specific to Item Reports are:

Subtotal Period

This option specifies the length and period to use as the Subtotal Period for the report. The Subtotal Period determines the timeframe that the system will use when calculating subtotals.

Within Subtotal Period, Subtotal By Attribute

Use this option indicates which item (User, Task, etc.) to subtotal by.

Only Show Rows Associated With Attribute Subtotal if Amounts Are

Use this option to limit the results returned by the report. The report can be configured to show only records that meet the rule you establish in this section. You may choose from greater than, less than, and equal to the amount you enter in the textfield.

Show Grand Total?

This option will display a grand total of all subtotals that are displayed in the report.

Show Zero Days and Zero Subtotals?

This option determines whether the report will display subtotals that equal '0' in value.

Show Details?

This option will display the selected fields below in the report output.

Combine Similar Records into a Single Row?

This option will combine all records that are identical in terms of Project, Task Pay Type, Bill Type, and comments into one record in this report, thereby simplifying the view. This is used to combine corrective records created when a sheet is rejected and modified through an approval process. Otherwise, the system will display all records individually.

Fields to Display

This section allows you to select the standard and extra fields to be shown in the report output. Choose a category of fields to display from the dropdown menu and then select one or more fields in the list of available fields.

The order in which fields are displayed left-to-right in the report correlates with the order in which they appear top-to-bottom in the Fields Displayed In Report column. Therefore, you can move a field closer to the left side of the report by using the button to bring that field closer to the top of this list. Conversely, you may move a field further to the right side of a report by using the button to move it lower in this list.

Note: The system will allow you to report on Custom Fields in addition to standard fields. Custom Fields labeled with an asterisk (*) are fields that have been enabled as Time Record Fields and will display their historical value - the value they had at the time of record creation - when shown in reports. Extra Fields that are not labeled with an asterisk are fields that have not been enabled as Time Record Fields and will display their current value - the value they have at the time that the report is run. For more information on making custom fields function as Time Record Fields, please see the Extra Fields portion of this manual.

Matrix Reports

Report Output Options

☐ Show percentages

☒ Show subtotals

Column headings: Project Fields Project Name

Row headings: Time Record Fields User

☒ Show users's column names from Entry Screen Configuration.

Additional header HTML: Standard journyx.com report header

Additional footer HTML: ###

Figure 28.14. Matrix Report options

Matrix reports provide a well-defined cross-reference style report that resembles a matrix. The options specific to Matrix Reports are:

Show Percentages

This option will calculate the percentages of the grand total that each subtotal item represents and display those percentages in the report.

Show Subtotals

This option will calculate and display subtotals for each category in the report output.

Column Headings will be... listbox

Choose one item from this dropdown list to serve as the column header. This value combined with the Row Header option will be the matrix.

Row Headings will be... listbox

Choose one item from this dropdown list to serve as the row header. This value combined with the Column Heading option will be the matrix.

Project Status Reports

Report Options

For each Project, subtotal by:

None

None

☒ Roll up project actuals

☐ Roll up subtotals

Fields to display in report

Available Fields

Project Fields (Legacy)

Project Description
Hours Worked
Total Estimate
Percent Complete
Percent of Estimate Used

Add

Remove

Fields displayed in report

Hours Worked
Total Estimate
Percent Complete
Percent of Estimate Used
Budgeted Total Hours

☒ Show users's column names from Entry Screen Configuration.

Additional header HTML

Actual Project Hours Vs. Estimated Project Hours

Additional footer HTML

Project Actual to Estimate Comparison

Figure 28.15. Project Status Report options

Project Status Reports allow you to view data from a project management point-of-view.

The options specific to Project Status Reports are:

Roll up project actuals

This option will add the hours logged to each subproject to the total hours logged to that subproject's parent project.

For each Project, subtotal by: listbox

You may use this section to choose the category you would like Timesheet to use for subtotalling in this report.

Roll up subtotals

This option will add the subtotal of the hours logged to each subproject to the subtotal of hours logged to that subproject's parent project.

Select Fields to Display in Report

This section allows you to select the standard and custom fields to be shown in the report output. Choose a category of fields to display from the dropdown menu and then select one or more fields in the list of available fields. You may use the Add button to add fields to the report. You may remove fields already contained in the report using the Remove button.

The order in which fields are displayed left-to-right in the report correlates with the order in which they appear top-to-bottom in the Fields Displayed In Report column. Therefore, you can move a field closer to the left side of the report by using the up arrow button to bring that field closer to the top of this list. Conversely, you may move a field further to the right side of a report by using the down arrow button to move it lower in this list.

Note: The system will allow you to report on Custom Fields in addition to standard fields. Custom Fields labeled with an asterisk (*) are fields that have been enabled as Time Record Fields and will display their historical value - the value they had at the time of record creation - when shown in reports. Custom Fields that are not labeled with an asterisk are fields that have not been enabled as Time Record Fields and will display their current value - the value they have at the time that the report is run. For more information on making custom fields function as Time Record Fields, please see the Custom Fields portion of this manual.

Total Cost Reports

You can create Total Cost Reports which show the total cost of a project or user by combining time, expense, and mileage data in a single report. Total Cost Reports can be created from the main Reporting screen, which is accessed via the Reports tab located at the top of each screen in Timesheet.

Report Output Options

Select Time or Rate Report

timesheet

[Modify report.](#)

Select Expense Report

ExpenseDetails: User

[Modify report.](#)

Display Time or Rate Report?

☒ Yes ☐ No

Display Expense Report?

☒ Yes ☐ No

Pay Rate Origin

User

Bill Rate Origin

User

Total Cost Field Is Sum Of

Expense Cost

Pay

Bill/Bill 1

Bill 2

Bill 3

Group by:

Common Fields

Project

Within each group, subtotal by:

None

None

Currency Symbol (for Display Purposes Only)

\$

Fields to display in report

Available Fields

Hours

Expense Cost

Pay

Bill/Bill 1

Bill 2

Add

Remove

Fields displayed in report

Hours

Bill/Bill 1

Pay

Expense Cost

Total Cost

The Expense Cost field should be displayed as:

Expense Cost

The Pay field should be displayed as:

Pay

The Bill/Bill 1 field should be displayed as:

Bill

The Bill 2 field should be displayed as:

Bill 2

The Bill 3 field should be displayed as:

Bill 3

The Total Cost field should be displayed as:

Total Cost

Figure 28.16. Total Cost Report

Date Ranges

All reports in Timesheet are designated as either reports that will request a date range or reports that will run for a particular period interval. This portion of the report creation screen allows you to select which date range style you would like to use for your new report. Reports that will request a date range are run for an amount of time relative to the date on which you run the report. When running such a report, the system will ask you for the date range for the report to cover before returning data. Reports that will run for a particular period interval are run for a specific period interval as defined within the report itself. When you run such reports, the system returns data based on the period that has been defined for the report when the report was created. If you chose to create reports that will request a date range, you may then move on to the next step in report creation; however, if you choose to create a report that will run on the specified period interval, you must provide details on the period before continuing to the next step. When creating such a report, you will need to choose a Length and Increment Type for the report. Report Lengths are a number between .25 and 365 as defined in the Length dropdown menu. Report Increments are standard time periods - day, week, month, and year. The output of such a report is based on the length/increment chosen at this point. Therefore, you could create a report that covers 90 Days or one quarter (.25) year or nearly any combination of length/increment. Obviously, certain combinations of length/increment are more useful than others. After indicating the Length of your new report, you must also define a Start for the report. The Start tells the system exactly where the report should begin when returning data. The system requires either a 'day of the week' or a combination of 'day of month' and a 'month of year' to function. A 'day of the week' must be selected for a report that has been configured with a length of one week or less. Reports that have been defined with a length of greater than one week must have a combination of 'day of month' and a 'month of year' established.

Report Options

Total Cost Reports are built from the data contained in two Base reports - a Time or Rate Report and an Expense Report. This section of the Report Modification screen allows you to specify which of these reports the system will use when gathering the data used to create this Total Cost Report.

Use the drop-down menus in this section to select the base reports to be used as the basis of this Total Cost Report. The 'Select Time or Rate Report' drop-down separates Time Reports and Rate Reports into two separate groups for easy identification. If you do not have any Rate Reports defined within the system, only Time Reports will be displayed in this dropdown. Additionally, only Timesheet Administrators will see the default Approval and Preview reports.

To make changes to the base Time or Rate Report and/or Expense Report, click the 'Click here to modify selected report' link located just below the dropdown menu for each selection. The system will open the Report Modification screen for the base reports in a new window. This will allow you to tailor the data contained within the base report in question, and thereby control what data is shown in this Total Cost Report.

Show or Hide Base Reports

The system can be configured to display or hide the base reports for the Total Cost Report on the output screen. Simply select 'yes' or 'no' for both the Time or Rate Report and the Expense Report that are serving as the base reports and the system will either display or hide those reports.

Pay and Bill Rate Origins

Total Cost Reports calculate values for payroll and billing by multiplying the hours worked by employees by the pay and bill rates contained within the system. Both projects and users can have pay and bill rates, and these options allow you to specify which rates should be used within this particular Total Cost Report. The possible choices are:

User

The system will use the user's pay or bill rate. If the user has no pay or bill rate, the system will not calculate a value for the user in question and will display a dash (-) for that user's records.

Project

The system will use the pay and bill rates associated with the project in question. If the project has no pay or bill rate, the system will not calculate a value for the project in question and will display a dash (-) for records associated with that project.

Greater

The system will use the greater rate value regardless of whether it is associated with the user or the project.

Lesser

The system will use the lesser rate value regardless of whether it is associated with the user or the project.

Prefer User

The system will attempt to use the user's rate value for calculations; however, if the user has no rate value Timesheet will look to the project in question and use the value associated with it rather than produce a (-) result by default.

Prefer Project

The system will attempt to use the project's rate value for calculations; however, if the project has no rate value Timesheet will look to the user in question and use the value associated with it rather than produce a (-) result by default.

Derived from Rate Report

The system will use rate values derived from the Rate Report that has been specified as one of the base reports for this Total Cost Report. This option will only be accepted by the system if you have selected a Rate Report as one of the base reports for this Total Cost Report. Otherwise, you will be asked to select a different option.

Total Cost is a Sum of?

This option allows you to specify which values are added together to determine the total cost for each project or user shown in this Total Cost Report. By default, the total cost is defined as the sum of the value of the Bill/Bill 1 fields and the Expenses field. You may also include the Payroll field and the Bill 2 and Bill 3 fields associated with a Rate Report if that Rate Report is chosen as one of the base reports for this Total Cost Report.

Groups Records By

This option allows you to specify whether the records contained in this Total Cost Report should be grouped by project or by user. The grouping method you choose here will allow you to see the total cost associated with either the project as a whole or on an individual user basis.

Subtotal By

You may or may not choose to display subtotals in this Total Cost Report. If you choose to show subtotals, you should choose the 'other' value from the previous option. For example, if you are designing a Total Cost Report that will group by project and you would like to include subtotals, you should choose subtotal by user for this option.

Currency Symbol

This option allows you to specify a currency symbol that will be used in this report only - this setting will not affect currency conversions, for this or any other report or function. You may include ASCII characters (\$, £, etc.) as well as HTML entities (¥ for ¥, etc.). Alternatively, you can also use the commonly recognized three-character abbreviation (YEN, USD, etc.) for the currency represented by the values in this report. Regardless of which method you use, this field may contain a maximum of 6 characters. Please note that currency symbols entered as HTML entities will appear as they are typed (i.e., ¥) in plain text versions of this report. Therefore Journyx recommends pasting ASCII characters or using three-letter abbreviations for the currency symbol for Total Cost Reports.

Fields to Display In This Report

This option allows you to specify which of the Total Cost Report fields should be displayed in the current Total Cost Report.

The available Total Cost Report fields are: (defaults in italics)

Hours
Expense Cost
Pay
Bill/Bill1
Bill 2
Bill 3
Total Cost

To add a field to the current Total Cost Report, select it in the Available Fields column and click the Add button. You may also add all the Total Cost Report fields to the current Total Cost Report by clicking Add All button. To remove a field from the current Total Cost Report, select the field in the Fields Displayed in Report column and click the Remove button. You may also remove all the Total Cost Report fields from the current Total Cost Report by clicking the Remove All button. You may change the display order of fields in the Total Cost Report by using the Up and Down Arrow buttons to move fields up or down as desired.

Field Display Names

This section of the Report Modification Screen allows you to customize the header names used for the fields displayed in this Total Cost Report. You may set these values to suit your needs. These values affect only this report and will not be reflected anywhere else within the system.

Report Header and Footer

The system provides access to the header and footer text that appear on each Timesheet report. These two areas accept plain text as well as HTML formatted text. Additionally, you may use one or more of the Journyx 'tricky tags' in these sections. Journyx 'tricky tags' are HTML-style tags that pull specific information directly from the system database, such as the name of the user who is viewing the report, the name of the Time Entry Screen that is currently active for the viewing user, and similar data. The complete list of tricky tags and the information that they provide is available in the Time Entry Screen Design portion of this manual.

Billable Forecast Reports

Billable Forecast Reports calculate billable hours and revenue for future months. The reports use the User Bill Rate custom field and future assignment schedules to determine approximate expected monthly billings in the future. The calculations work for both Time and Materials (T&M) and Fixed Price (FP) projects.

Report Output Options

☐ Show detailed information by user

Fields to display in report

Available Fields

Project Name
Project Type
Billable Hours
Billable Amount
Unassigned Hours

AddRemove

Fields displayed in report

Project Name
Project Type
Billable Hours
Billable Amount
Unassigned Hours

▲▼

Additional header HTML

Standard journyx.com report header

Additional footer HTML

###

Figure 28.20. Billable Forecast Report options

Billable Forecast Reports have some prerequisites for displaying accurate data. The prerequisites are as follows:

1. There must be a project custom field named 'Project Type'. The field must be a text selection list with two values (if you want to use both billing calculation methods): 'Time & Material' and 'Fixed Price'. You can also add a third selection, such as 'Not Applicable', for projects that should not be displayed in Billable Forecast Reports. The Project Type selected for the top level project will automatically apply to all of the project's tasks.
2. Users included in reports for Time and Materials-based projects must have values in the User Bill Rate fields and the User Bill Rate Type must be Hourly.
3. The system setting under Configuration→System Settings→Project Settings for 'Default number of hours worked each week' must contain a value and/or the 'User Work Hours Per Week' must be set for each user.
4. Fixed Price projects must include a contract value for leveling across the period of the project. There must be a project custom field named 'Services Contract Value' with the dollar amount of the return expected for the project. The data type for the field must be set to number. The value for the top level project automatically applies to all tasks underneath the project.
5. All billable time to be forecasted must be covered by an explicit user assignment to a project task.

The options specific to Billable Forecast Reports are:

Billable Hours

This field shows the total *remaining* scheduled hours forecasted for billable projects based on the date range selected and broken out by month. Since this is a future/forecast report, there should be no actual hours to consider, but they will be ignored if entered. The scheduled hours are calculated based on the task assignments for a project.

Billable Amount

There are two separate calculations that are performed to establish the total estimated billing for any month, one for Time & Material project and one for Fixed Price projects. The Fixed Price calculation determines **Earned Services Revenue (ESR)**, which is defined as (services % complete * services contract value). The Time & Material calculation determines **Billed Services Revenue (BSR)**, which is defined as (projected user hours * user bill rate). For this report, both types of projects are shown on a monthly basis for all users and then aggregated to give the monthly total.

Unassigned Hours

This field shows the number of task scheduled hours that are still unassigned broken out by month. These scheduled hours are not included in the Billable Amounts because there are no users assigned to work these hours.

Show detailed information by user

This option breaks down each task and project into the Monthly Billable Hours and Amounts per user. The user details are listed under each task and/or project.

Select Fields to Display in Report

This section allows you to select the fields to be shown in the report output. You can select one or more fields in the list of available fields. You may use the Add button to add fields to the report. You may remove fields already contained in the report using the Remove button.

The order in which fields are displayed left-to-right in the report correlates with the order in which they appear top-to-bottom in the Fields Displayed In Report column. Therefore, you can move a field closer to the left side of the report by using the up arrow button to bring that field closer to the top of this list. Conversely, you may move a field further to the right side of a report by using the down arrow button to move it lower in this list.

Report Header and Footer

The system provides access to the header and footer text that appear on each Timesheet report. These two areas accept plain text as well as HTML formatted text. Additionally, you may use one or more of the Journyx 'tricky tags' in these sections. Journyx 'tricky tags' are HTML-style tags that pull specific information directly from the system database, such as the name of the user who is viewing the report, the name of the Time Entry Screen that is currently active for the viewing user, and similar data. The complete list of tricky tags and the information that they provide is available in the Time Entry Screen Design portion of this manual.

Utilization/Chargeability Reports

Utilization/Chargeability Reports calculate utilization and billing rates for evaluation against target rates.

Report Output Options

Data aggregation options

☒ Do not aggregate rows
☐ Show aggregated details

Fields to display in report

Available Fields: User Name, Actual Hours, Utilizable Hours, Target Utilization %, Actual Utilization %

Fields displayed in report: User Name, Actual Hours, Utilizable Hours, Target Utilization %, Actual Utilization %, Utilization Variance, Billable Hours, Target Chargeability %, Actual Chargeability %, Chargeability Variance

Buttons: Add, Remove

Additional header HTML: Standard journyx.com report header

Additional footer HTML: ###

Figure 28.21. Utilization/Chargeability Report options

Utilization/Chargeability Reports have some prerequisites for displaying accurate data. The prerequisites are as follows:

1. There must be a project custom field named 'Utilization Eligible' to determine which projects are displayed for utilization data. The field must be a text selection list with two values: 'Yes' and 'No'. Projects set to Yes will be available for reporting on utilization data. The value selected for the top level project will automatically apply to all of the project's tasks. This field must be set for a project and each of its tasks individually. This can be set in the user interface or using the project import tool.
2. There must be a project custom field named 'Project Bill Type' to determine which projects are displayed for billing rate data. The field must be a text selection list with two values: 'Billable' and 'Not Billable'. Projects set to Billable will be available for reporting on billing rate data. The value selected for the top level project will automatically apply to all of the project's tasks. This field must be set for a project and each of its tasks individually. This can be set in the user interface or using the project import tool.
3. The system setting under Configuration→System Settings→Project Settings for 'Overhead percentage applied to assignment work' must contain a value and/or the 'User Overhead Percent' must be set for each user.
4. The system setting under Configuration→System Settings→Project Settings for 'Default number of hours worked each week' must contain a value and/or the 'User Work Hours Per Week' must be set for each user.

5. There must be 2 user custom fields named 'Target Utilization' and 'Target Chargeability'. These fields must be set to the data type of number. There must be values in these fields for each of the users you want to report on.

The options specific to Utilization/Chargeability Reports are:

Actual Hours

This field displays the actual hours the user worked for the selected period.

Target Utilization %

This field displays the value in the user's Target Utilization field.

Actual Utilization %

This field is a calculation of total hours logged against tasks that are flagged "Yes" in the Utilization Eligible custom project field for the selected dates ÷ (user work hours per day X number of working days between dates).

Utilization Variance

This field subtracts target utilization from actual utilization.

Billable Hours

This field displays the actual hours the user worked for the selected period that are eligible for billing based on the Project Bill Type field.

Target Chargeability %

This field displays the value in the user's Target Chargeability field.

Actual Chargeability %

This field is a calculation of total hours logged against tasks that are "Billable" for selected dates ÷ ((user work hours per week x (report end date – report start date)) ÷ 7 days).

Chargeability Variance

This field subtracts target chargeability from actual chargeability.

Show aggregated details

This option allows you to aggregate utilization or chargeability rates for multiple users.

Select Fields to Display in Report

This section allows you to select the fields to be shown in the report output. You can select one or more fields in the list of available fields. You may use the Add button to add fields to the report. You may remove fields already contained in the report using the Remove button.

The order in which fields are displayed left-to-right in the report correlates with the order in which they appear top-to-bottom in the Fields Displayed In Report column. Therefore, you can move a field closer to the left side of the report by using the up arrow button to bring that field closer to the top of this list. Conversely, you may move a field further to the right side of a report by using the down arrow button to move it lower in this list.

Report Header and Footer

The system provides access to the header and footer text that appear on each Timesheet report. These two areas accept plain text as well as HTML formatted text. Additionally, you may use one or more of the Journyx 'tricky tags' in these sections. Journyx 'tricky tags' are

HTML-style tags that pull specific information directly from the system database, such as the name of the user who is viewing the report, the name of the Time Entry Screen that is currently active for the viewing user, and similar data. The complete list of tricky tags and the information that they provide is available in the Time Entry Screen Design portion of this manual.

Saving a New Report

At the bottom of the Report Modification screen, the system provides access to tools needed to save the new report. You may also choose to save and run your new report to see how the report output looks onscreen by clicking the Save and Run Report button. You may run your new report in any of the report output formats discussed above in the Running a Report section.

Modifying Reports

To modify any existing report, simply select the report you wish to change from the list of available reports on the Main Report Menu by clicking on the report name. The system will display the Report Modification Screen, with all of the current settings for the report in question already in place. You may modify these settings as desired. For information on each of the report options displayed on the Report Modification Screen please see the Creating a Report section above.

Please note that although Journyx allows you to modify the default reports freely, we strongly recommend copying an existing report to a new report before modifying one of these default reports as a backup procedure. More information on copying reports can be found below in the Copying Reports section.

Copying Reports

You can copy existing reports to other users. You can also use this functionality to create a 'backup' copy of one of your existing reports before you make changes to it. The process for copying a report, both to yourself and to other users, is outlined below. Select the report you wish to copy from the list of existing reports on the Main Report Menu. Click the Copy button. The system will display the Report Copying screen. Select the users you would like to copy the report to. You can use ctrl-click or shift-click functionality to select multiple users. You may click your own user name to copy this report to yourself. Enter a name for the copied report. Indicate whether or not the new report overwrites existing reports with the same name. In general, you should attempt to overwrite an existing report. This option is generally only used by Timesheet Administrators when a change is needed system-wide in a standard report. Click the Copy Report button.

The system will display the Main Report Menu, including a green text message indicating that the report has been copied to the users you selected. The selected users will now see the report you have copied to them in their list of available reports.

Removing Reports

Reports in the system can be removed on an individual user basis - that is, each user can remove reports for him or herself only. All of a user's available reports can be removed, including the default reports that ship with the product. To remove a report, simply select the report to remove from the list of available reports and click the Delete button. The system will display a popup warning window asking you to confirm that you do indeed wish to delete the selected report. If you wish to continue, click the OK button in the popup window. The system will refresh the Main Report Menu and display a green text message confirming the deletion of the selected report. Additionally, the deleted report will no longer be listed in the available reports list.

Journyx strongly recommends deleting only those reports you are certain you no longer need. If you accidentally delete a default report, your organization's Timesheet Administrator should be able to copy his version of the report to you. If you delete a custom report, you will have to create that report from scratch again, unless another user in your organization has a copy that they can copy to you. For more information on copying reports to other users, please see the Copying Reports section above.

Journyx Reportlink

Information for downloading and using Journyx Reportlink is located under Reports→ Reportlink Exchange. This screen includes access to the most up-to-date version of the Reportlink installer, as well as the Reportlink User Manual (available when downloading the installer). Reportlink is an optional , MS Excel-based reporting engine, and you must have a license key for access to the installer. Reportlink includes a variety of data feeds that can be loaded into pivot tables or spreadsheets. It also includes the ability to run your Standard and System reports as pivot reports in Excel. More information is available in the Reportlink User Manual.

Dashboard

Dashboard Reports

The dashboard reporting functionality is located under the Dashboard menu. The Dashboard screen allows you to set up a report or series of reports for activities such as monitoring individual project plans and comparing portfolios of projects. (see figure 35.1).

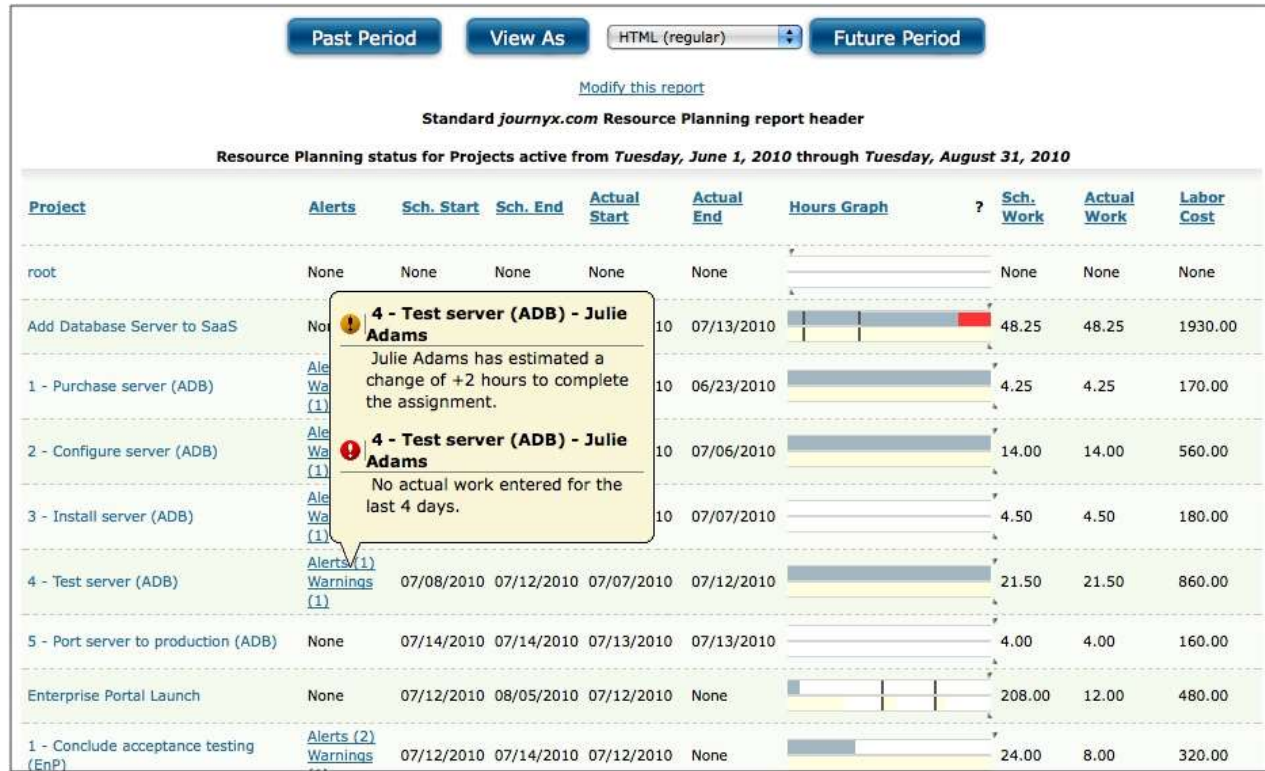


Figure 35.1. Dashboard

The Dashboard data is fed by reports created and customized under the Reports→Standard Reports tab. While additional types of reports will be available for Dashboard display in future versions of the software, the Scheduled Project Status Report type is the foundation for the Dashboard in the current version. You have the option of setting up a single report for automatic display in the Dashboard (see figure 35.1), or you can set up multiple reports with different data and configurations that you can toggle between in the Dashboard view (see figure 35.2).

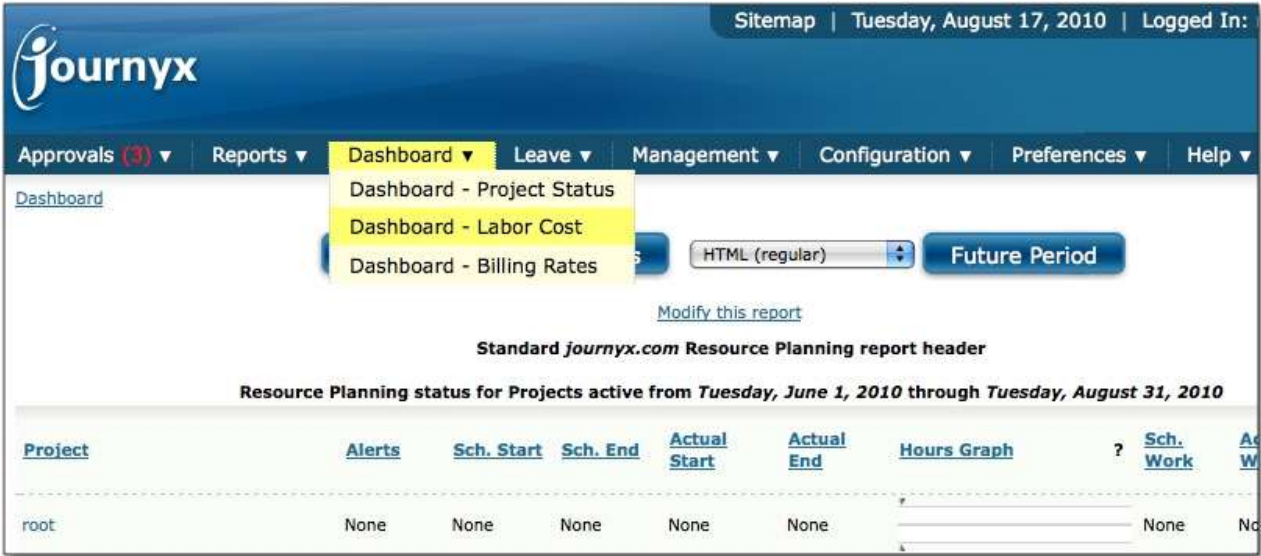


Figure 35.2. Dashboard with multiple reports

If you have a single Scheduled Project Status Report type saved under Reports→Standard Reports, the output will be displayed automatically when you click on the Dashboard tab. A single report can be useful when a system administrator needs to copy a single report to an account set up for a specific type of reporting access - someone who logs in to the system to view a pre-configured Dashboard with set data. If your account includes access to Reports->Standard Reports and you create more than one Scheduled Project Status Report type, you will see a list of reports to run under the Dashboard menu (see figure 35.2). Multiple reports are useful when you need easy and regular access to a variety of pre-configured reports with different information.

The Scheduled Project Status Report type includes a variety of data options for inclusion in report output. You can use it to compare top level project budget variance and ROI. You can also use it to identify specific assigned resources who are at risk of falling behind on specific tasks. Data fields include basic text, graphics and interactive links to greater detail. See the Reporting section for more information on creating, customizing and running Scheduled Project Status Reports in various output formats.

User Functionality

My Assignments

Managing Assignments

My Assignments is located under the My Assignments menu (see figure 34.1).

My Assignments allows you to view, manage and track time against your task assignments for scheduled projects. While My Assignments can be used in tandem with a traditional Time Entry screen, it includes non-project time and time off tracking that allows you to enter all of your time on one screen.



Figure 34.1. My Assignments

My Assignments shows a weekly view of your task assignments scheduled for a given week, as well as unfinished assignments from the previous week(s). The number of old assignments that are carried over depends on how your Administrator has your site configured. At the top of the screen is the date range for the week shown with arrows for navigating to previous and future weeks (provided your system administrator has given you access to the arrows). In the first column on the left side of the assignment panel below the arrows and dates, the task names associated with each assignment are displayed. The task names include more information about the associated project plans when you mouse over them. To the right of the task name in the same column, you will see icons with mouse over information for alerts/warnings associated with the assignment if there are any. You will also see a clock icon for entering actual work against the assignment if the period is open for time entry. Entering time will be discussed in more detail below. In addition to the task name, mouse over project information, clock icons and alert icons, the assignment panel includes:

- **Progress on Week Plan** - This section acts as a guide for the weekly pace needed to work an assignment evenly over time. While you may not choose to work an assignment evenly over all of the days allotted, this guide provides a visual reference for when time is running short.
- **Week Schedule** - This section shows your assignment schedules versus actual work entered on a daily basis. Actual work is shown as a number of hours within the yellow scheduled hours bar. Weekends/leave/holidays and the current day are highlighted in different colors, and clock icons next to each day provide single day time entry panel for all assignments. Entering time will be discussed in more detail below.
- **Assignment Start/End Date** - This section shows the start and end dates the project manager has set for the assignment.

- **Assignment Progress** - This section shows the total progress based on all actual versus scheduled work for the entire assignment.
- **Assignment Remain** - This section shows the total remaining work based on all actual work versus the current scheduled work set by the project manager.
- **Assignment Est. Remain** - This field allows you to request more time or notify your project manager that you need less time to complete an assignment. To notify your project manager that you need a change to the schedule, you simply enter the number of hours you have left in the Est. Remain field. The number you enter will turn green to indicate your change request has been saved, but you can change/update it at any time. Your project manager will only see the current value when he checks project alerts for change requests. The numbers you enter in the Est. Remain fields will continue to appear in the fields until your project manager accepts the changes by working them into the project schedules. Project managers can either add/subtract the changes to/from your current assignment, or they can add them to a pool of unassigned hours for future assignment to others. In either case, your changes in the Est. Remain fields will no longer appear after the project manager has accepted them into the project schedule. In the event that your changes are added to/subtracted from your assignment, you will see the Assignment Remain field adjusted by the amount of your change.
- **Assignment Finished** - This field allows you to signal that you have completed the work on an assignment. In the event that you finish an assignment with less or more actual work than was scheduled, you will need to select this checkbox when finished. If you simply enter the same amount of actual work as was scheduled, this field will be automatically selected as a convenience. It can be unselected at any time if an assignment requires more work.

Under the assignment totals, there is a section for Other Tasks with a clock icon for entering time for informal projects, non-project work and leave time. At the foot of the panel, there are totals for all assignment and non-assignment time for the week.

The Review and Submit button below the assignment panel allows you to review all of your time in a detailed report with totals and subtotals. This report can be customized under Reports→Standard Reports by modifying the time report selected for the View Time Report button under the Preferences tab (the `timesheet` report by default). If your time is also subject to a period or project approval plan, you will have a Submit for Approval button at the top of the report for submitting your time for approval when it is completed and reviewed for the entire period. Once you have submitted your time for approval, you will not be able to make changes to it. If you discover errors after you have submitted your time for approval, you must contact your designated approver to regain edit access to your time for the period.

The report attached to the Review and Submit button also includes options for viewing past and future periods. These periods are based on the time period your system administrator has assigned to you and may or may not match the weekly default view for My Assignments. The report also has a variety of format viewability options and a Return button for going back to time entry.

Managing Time Entries

You can access the Time Entry panel for the My Assignments screen by clicking on any of the clock icons next to the assignment task names or the names of the days under Week Schedule. (see figure 34.1).

The Time Entry panel allows you to input the hours that you worked on a specific assignment or your hours for all work on a given day. Selecting a clock icon next to a task name brings up

a Time Entry panel for the selected assignment for an entire week (see figure 34.1.1). Selecting a clock icon next to a day brings up a Time Entry panel with a list of the current week's assignments for the selected day (see figure 34.1.2).

Activity	Pay Type	Bill Type	Comment	Sun	Mon	Tue	Wed	Thu	Fri	Sat
New	Other	Regular	Standard							
Assignment	Other	Regular	Standard		6.00	2.00				
				0.00h	6.00h	2.00h	0.00h	0.00h	0.00h	0.00h

Save Close

Figure 34.1.1. Time Entry by Assignment

Project	Activity	Pay Type	Bill Type	Comment	Hours
New	root	Other	Regular	Standard	
Active Assignments	1 - Conclude acceptance testing (EnP)	Other	Regular	Standard	4.00
	2 - Initiate beta testing (EnP)	Other	Regular	Standard	
	3 - Monitor beta testing (EnP)	Other	Regular	Standard	
Recently Used	4 - Test server (ADB)	Other	Regular	Standard	
	5 - Port server to production (ADB)	Other	Regular	Standard	
	root	Meetings	Regular	Standard	

Save Close

Figure 34.1.2. Time Entry by Day

To enter time or view hours for a different period, you can use the Calendar in the login bar to jump to a particular date. Alternatively, you may use the date arrow icons to move backward or forward one week at a time assuming your system administrator has given you access to past and future periods for time entry.

Keep in mind that timesheets are configured by administrators, so your time entry panel may vary in appearance and functionality from the one shown. The system allows your organization to customize the names of items used for time tracking. For example, certain column headers in your time entry panel such as Project, Activity, Pay Type, and Bill Type may be hidden or may have been renamed altogether.

Users are able to enter time as discreet units of time that are associated with individual Projects, Activities, Pay Types and Bill Types. Additionally, each of these time entries may also have a text comment associated with it to further specify the nature of the hours logged. The system default for Time Entry will allow you to select a Project (unless you're tracking time for a specific assignment, in which case the Project/Task is already pre-selected), Activity, Pay Type, and Bill Type. To create a time entry, select a value from each of the dropdowns shown

on your Time Entry panel. You may also enter a Comment for the time entry row. Once everything has been selected, you need to enter the hours worked for that project/task on a specific date. As an alternative, you can enter hours in the rows under the Recently Used section that includes entries you have used in the previous week(s). See the Preferences section to find out how to adjust the number of weeks' entries to display in the Recently Used section.

The Time Entry panel will accept hour entries in both standard HH:MM (2:35) format, as well as in decimal format (1.25 = 1:15). If you enter hours in HH:MM format, it will convert your entry to decimal format, rounding to the nearest whole hundredth.


Once you have selected the appropriate items and entered your hours for that combination, click the Save button at the bottom of the Time Entry panel. The screen will refresh and your entries will now appear in the Active Tasks section. You may add hours to this entry either in the same day or in another day during the week that is currently displayed. You may create more than one time record at a time. Simply create the actual time entries for different days and/or different combinations of items and then click the Save button at the bottom of the screen. The screen will refresh and your entries will now appear in the Active Tasks section.

To edit a time entry, you can change the hours directly in the hours field, or you can create a new entry to change the selected values in the dropdowns. To delete a time entry, you simply erase the hours in the hours field and click Save.

Searching For and Selecting a Project/Task

There are two ways to select a project/task when managing time entries. You can simply use the Project dropdown sorted in alphabetical order by project/task name, or you can use Project Search to locate projects/tasks using additional criteria.

Project Search

Search allows you to specify search criteria and select a project/task from the search results. To do a project search, click the Project Search Icon () , the magnifying glass, located to the left of the respective Project dropdown. This will launch a pop-up window containing search criteria (see figure 34.3). Specify all or part of the project/task name or description for the project that you are trying to locate. As you type, you will see returned search results below the search criteria. From the search results, you can select the project for which you wish to log time. When you select the project, the pop-up window will automatically close and the project you selected should appear in the Project dropdown menu. Additional search options can be selected by clicking on the arrow to expand the Search Options table.

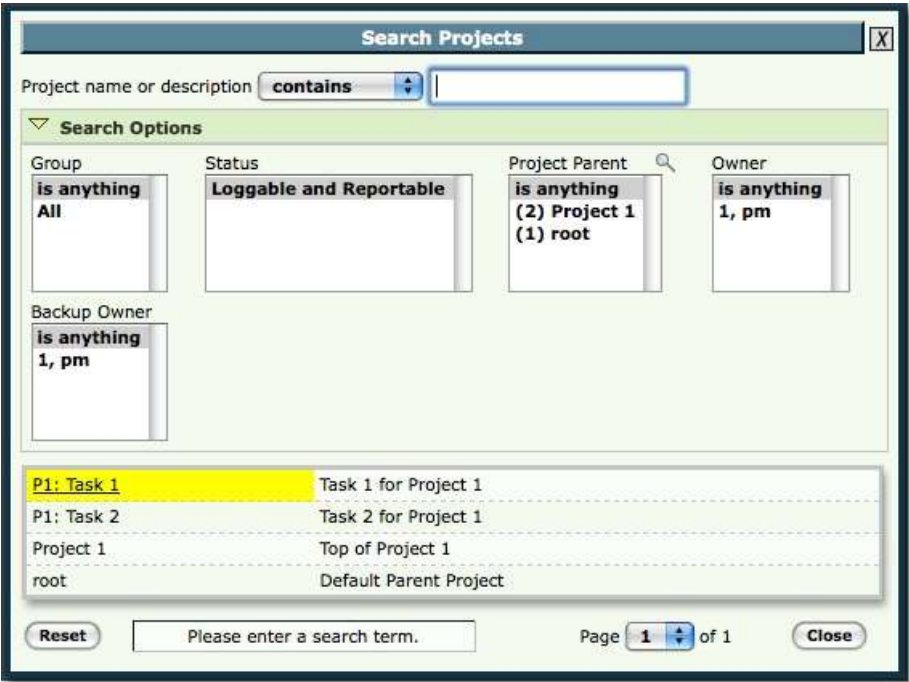



Figure 34.3. Project search

Time Entry

Managing Time Entries

Time Entry is located under Time→Standard Time Entry (see figure 29.1). Time Entry allows you to input the hours that you worked on a single timesheet. You can view your time for a single day or an entire period. Time Entry displays the period view by default. To enter time for a period, go to Viewing by Period. To enter time or view hours for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons  to move backward or forward one period at a time. To enter time for a single day, go to Viewing by Day. To enter time or view hours for a different day, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons to move backward or forward one day at a time.

Time -- Standard Time Entry --

Viewing by Period | Day 07/25/2010 through 07/31/2010

YOUR COMPANY NAME HERE: A, U

Sheet Status: Open for Entry

Sheet History My Projects (0) Memorized Sheets Leave Requests

Project	Activity	Pay Type	Bill Type	Comment	Sun 07/25	Mon 07/26	Tue 07/27	Wed 07/28	Thu 07/29	Fri 07/30	Sat 07/31
root Project 1	Coding	Regular	Standard	clean up		8:00 - 4:15					
P1: Task 2	Design/Plan	Regular	Billable	initial planning		2:30					
New											
root	Other	Regular	Standard	Default Comments							
root	Other	Regular	Standard	Default Comments							
root	Other	Regular	Standard	Default Comments							
					0:00	8:30	4:15	0:00	0:00	0:00	0:00
											12:45

Save View Time Report Submit for Approval


Figure 29.1. Time Entry

Keep in mind that timesheets are configured by administrators so your timesheet may vary in appearance and functionality from the one shown. The system allows your organization to customize the names of items used for time tracking. For example, certain column headers in your timesheet such as Project, Task, Pay Type, and Bill Type may be hidden or may have been renamed altogether.

Users are able to enter time as discreet units of time that are associated with individual Projects, Tasks, Pay Types and Bill Types. Additionally, each of these time entries may also have a text comment associated with it to further specify the nature of the hours logged.

The default timesheet is shown below. This section of the manual will refer to items as they are seen on this particular timesheet. Again, your timesheet may differ slightly. However, it should behave exactly as described here, even if the names have been changed or certain columns are not visible.


Your administrator has already set up your timesheet to let you log hours worked during a particular period or date range. Timesheet periods are typically a week, month, or pay period, depending on how your company prefers to track the time that you spend on projects. To enter time or view hours for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use


the Date Arrow Icons  at the top of the timesheet to move backward or forward one period at a time.

Standard timesheets will typically let you select a Project, Task, Pay Type, and Bill Type. To create a time entry, select a value from each of the dropdowns shown on your timesheet. You may also be required to specify a Comment for the time entry, depending on what your administrator has set up for your timesheet. Once everything has been selected, you need to specify the hours worked for that project on a specific date. Assuming your administrator has not limited entry to a single format, your timesheet will accept hour entries in both standard HH:MM (2:35) format as well as in decimal format (1.25 = 1:15). If you enter hours in decimal format, it will convert your entry to HH:MM, rounding to the nearest whole minute. Values 0.5 and higher will be rounded up; values 0.49 and lower will be rounded down. Therefore, if you enter 1.13, the system will convert this to 1:08 (1.13 hours = 1 hour and 7.8 minutes, rounded up to 1 hour and 8 minutes).

Depending on the timesheet settings set up by the administrator, you may also be able to enter your time as a percentage of the work day. The total hours in a workday will also be defined by your system administrator. So if the workday is defined as 8 hours per day and you worked 4 hours, you would simply specify 50 for having worked 50% for that workday.

Once you have selected the appropriate items and entered your hours for that combination, click the Save button at the bottom of the time entry grid. The timesheet will refresh and your entries will now appear in the Current section. You may add hours to this entry either in the same day or in another day in the time period that is currently displayed. You may create more than one time record at a time. Simply create the actual time entries for different days and/or different combinations of items and then click the Save button at the bottom of the timesheet. The timesheet will refresh and your entries will now appear in the Current section.


To edit a time entry on your timesheet, click the Edit Icon  to the left of the respective entry. This will refresh the screen and allow you to change the Project, Task, Pay Type, and Bill Type. You can also modify your Comment associated with the entry.

To delete a time entry from your timesheet, you can click the Delete Icon  to the right of the respective time entry. The screen will refresh with the time entry having been removed.

Searching For and Selecting a Project

There are four ways to select a project when managing time entries. You can use the expandable Project Tree, the Inline Tree in the Project dropdown, Project Search, or the My Projects List.

Project Tree

The first method allows you to select a project from a hierarchical tree that contains all the projects to which you have been granted access, as well as some of the parent projects that are required for drilling down into the hierarchy. To view the tree, click the Project Tree Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing a navigable project tree with expanding and collapsing nodes (see figure 29.2). To open a node and view all child projects, click the expand node. To close a node and hide all child projects, click the collapse node. When you have found the project that you wish to log time to, select the project and then click the Done button. This will close the pop-up window and the project you selected should appear in the Project dropdown.

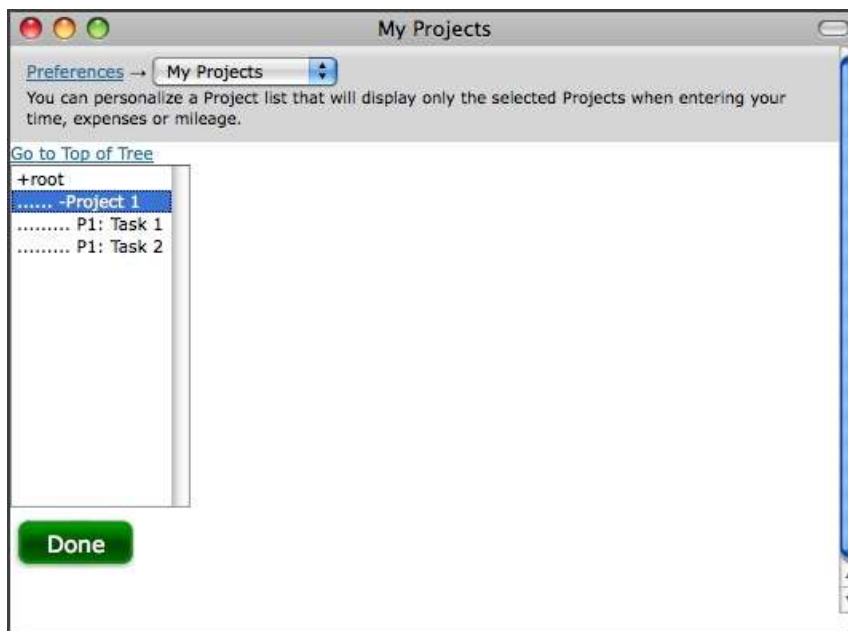



Figure 29.2. Project tree

Inline Tree in Dropdown

The second method allows you to drill down into the project hierarchy using a project tree that is included in the project dropdown itself. If your administrator has set up your timesheet to include this option, you can navigate down through the hierarchy of projects by clicking on selections directly in the Project dropdown. After each selection, the next level in the hierarchy is displayed. The final selection that is made prior to save determines the project to which time will be logged.

Project Search

The third method allows you to specify search criteria and select a project from the search results. To do a project search, click the Project Search Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing

search criteria (see figure 29.3). Specify the project name or description for the project that you are searching for. As you type, you will see returned search results below the search criteria. From the search results, you can select the project that you wish to log hours for. When you select the project, the pop-up window will automatically close and the project you selected should appear in the Project dropdown menu. Additional search options can be selected by clicking on the arrow to expand the Search Options table.

Search Projects

Project name or description **contains**

Search Options

Group is anything All	Status Loggable and Reportable	Project Parent is anything (2) Project 1 (1) root	Owner is anything 1, pm
------------------------------------	--	---	--------------------------------------

Backup Owner
is anything
1, pm

P1: Task 1	Task 1 for Project 1
P1: Task 2	Task 2 for Project 1
Project 1	Top of Project 1
root	Default Parent Project

Reset Page **1** of 1 **Close**

Figure 29.3. Project search

My Project List

You can maintain your own unique list of projects that will be displayed by default in the project dropdown. This will keep you from having to routinely search for or select a project from the project tree for projects that you frequently log hours to. The My Projects link, located at the bottom of the timesheet will launch a pop-up window that can be used to add and remove projects from your unique Project List (see figure 29.4). You may add projects from the Available Projects list by selecting the project and clicking the Add button. These projects will be added to your Project List shown in the box to the right. To remove a project from your Project List, select the project and click the Remove button. You also have the ability to add and remove all projects to and from your Project List. When you are finished, click the Save button.

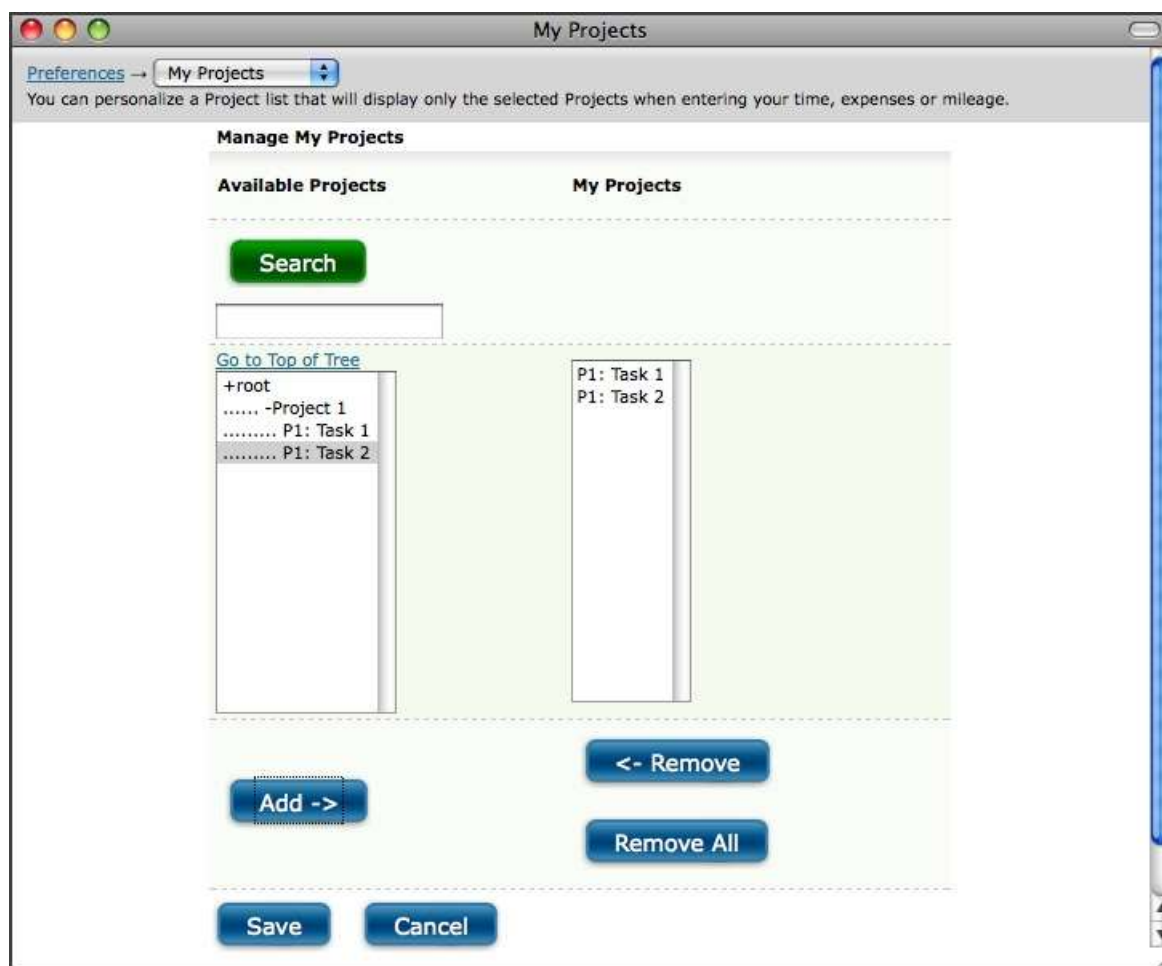



Figure 29.4. My Projects

Memorized Entries

Memorized Entries allow you to save your most common tasks so that you do not have to repeatedly select them when entering time. A Memorized Entry contains a single Project, Task, Pay Type, Bill Type, and Comment. After an entry has been memorized, it will appear in all your timesheets thereafter. You then only need to specify the hours, if any, for that task.

To create a Memorized Entry, select the appropriate Project, Task, Pay Type, Bill Type, and Comment, and then click the Save button. You can only create a Memorized Entry after that entry has been saved in your timesheet. After the entry has been saved, you will see the Memorize Icon  to the right of the entry. Click the Memorize Entry Icon, review the contents of the entry as it is displayed on the User Memorized Entries screen, and click Save to preserve the entry. The information in that entry will be memorized, except the hours, and will appear in all your timesheets thereafter. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank.

Alternatively, you may create a Memorized Entry by going to Time→Memorized Entries→Create Memorized Entry (see figure 29.5). Select a Project, Task, Pay Type, Bill Type, and Comment. When finished, click the Save button. The entry will be memorized and will appear in all your timesheets.

Time → Memorized Entries → Manage Memorized Entries → Create User Memorized Entry

Memorized time entries are commonly recurring tasks displayed automatically in user timesheets. This new memorized entry will be inserted into your timesheets.

Select a memorized entry type:

Time

Load

User	Project	Activity	Pay Type	Bill Type	Comment
4, u	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	
<div>Save</div> <div>Save and New</div> <div>Cancel</div>					

The Group selection dropdown should only require a value selection if the Group column is included for tracking on your time entry screen.

Figure 29.5. Memorized Time Entries

To manage existing Memorized Entries, go to Time→Memorized Entries→Manage Memorized Entries. This screen will show you all the Memorized Entries that you have stored in the system. These are all the Memorized Entries that appear in your timesheets. You can change the Project, Task, Pay Type, Bill Type, and Comment for the respective Memorized Entry that you want to modify. When finished, click the Save button. To delete a Memorized Entry from your timesheet, select the Memorized Entries to delete and click the Delete button.

Memorized Sheets

Memorized Sheets allow you to save your routine tasks with preset hours so that you do not have to repeatedly select them when entering time. A Memorized Sheet can contain one or more time entries. Each time entry will contain a Project, Task, Pay Type, Bill Type, Comment, and hours. Once a Memorized Sheet has been created, you can load it into your timesheet when you are logging hours. To view Memorized Sheet functionality, click the Memorized Sheets link at the bottom of your timesheet. This will load the Manage Memorized Sheets section (see figure 29.6).

Create New Memorized Sheets

enter name

Create Sheet

Manage Memorized Sheets

*(u3) User 3 Sheet

Load Sheet

Edit Sheet

Delete Sheet

Set As Default

Clear Default

Figure 29.6. Memorized Sheet options

Create Memorized Sheet

You can create a Memorized Sheet from within your timesheet. Select your routine Projects, Tasks, Pay Types, Bill Types, Comments, and Hours. Once finished, specify a

name for the Memorized Sheet - one that will be easy to remember when you want to load it into your timesheet in the future. Then check the 'apply above time records' setting and click the Memorized Sheet button. This will direct you to the Memorized Sheet Modification screen which will allow you to make changes to the new sheet. When you are finished editing the sheet, click Modify to save the Memorized Sheet for future use.

Loading an Existing Memorized Sheet

If your administrator has granted you permission, you can load an existing Memorized Sheet containing your routine tasks and hours. When logging hours in your timesheet, simply select the Memorized Sheet that you would like to load from the respective dropdown and click the Load button. Your timesheet will refresh with the Memorized Sheet, which contains your routine tasks with preset hours.

Edit and Delete Memorized Sheet

To manage an existing Memorized Sheet, select the Memorized Sheet from the selection dropdown and click the Edit Memorized Sheet button. This will direct you to a page containing that Memorized Sheet's routine tasks and preset hours. You may change your Project, Task, Pay Type, Bill Type, Comment, and Hours. Additional entries can be created by entering time in one of the blank rows. Entries can be removed by clicking on the Remove icon. When finished making modifications, click the Save button.


To delete a Memorized Sheet, simply select it from the dropdown and click the Delete Memorized Sheet button.

Time In/Out

Your administrator may have configured your timesheet to contain the Time In/Out feature. If so, this feature allows you to manually log the time that you begin and end your work day. Alternatively, you may be able to click on a punch clock icon that records the in and out times based on your company's Timesheet server clock. Additionally, your administrator may have also given you the ability to log in and out multiple times in a single day. To log the beginning of your work day, simply specify the time in the In field, including an 'a' or 'p' for a.m. or p.m. of the respective date. To log out, specify the time in the Out field of the respective date. At the bottom of the Time In/Out module, you will see the total hours from logging in and out for your work day. Along with entering your Time In/Out, you may have the standard timesheet features to enter the number of hours spent on specific tasks throughout the day. At the bottom of the standard timesheet module, you will see the total hours from entering the time spent on specific projects. Your administrator may require that the total Time In/Out hours equal the total time spent on specific projects for the day.

Project Entry Notes

The system allows you to create Project Notes for any time record within a time entry. Project Notes provide a way for you to record complex comments and information for hours logged to a project over the course of a time period. You can create a Project Note for a

specific time record by clicking the Project Note icon  located immediately to the right of a saved time record on your timesheet. Again, the time entry must already be saved in the system before you will see the yellow note appear. Clicking on the note will launch a pop-up window, which can be used to create, edit, or delete Project Notes (see figure 29.7).

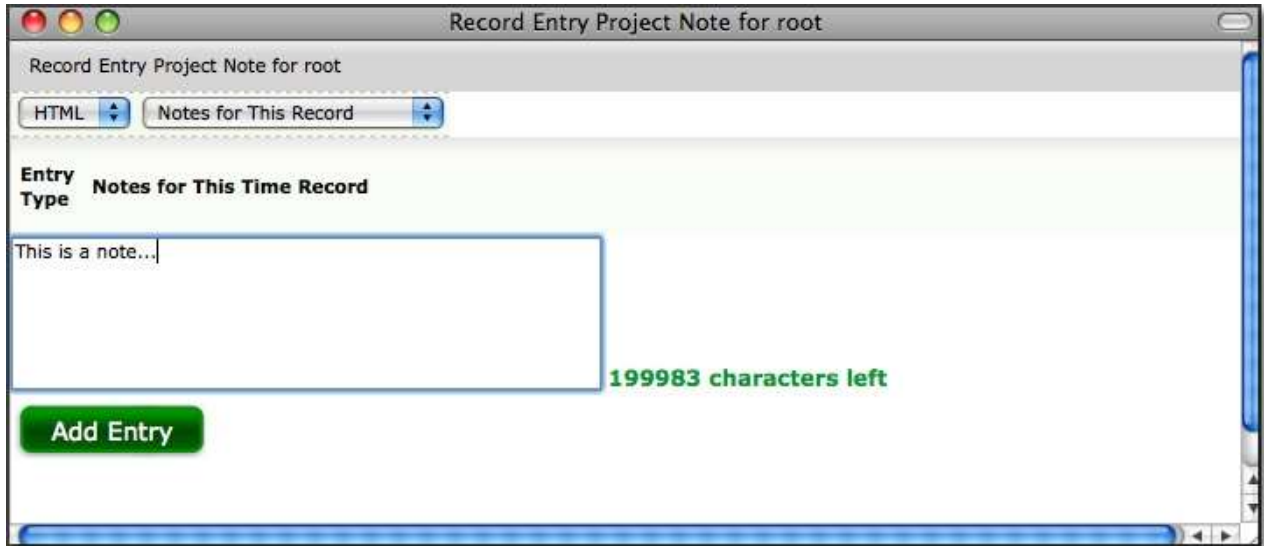


Figure 29.7. Project Notes

You can also manage Project Notes under Preferences→Project Notes. You can view existing Project Notes by specifying the search criteria and date range and then clicking the Search button. The search results of Project Notes will be displayed below the criteria. To create a new Project Note, go to the 'Create a New Project Note' section. Select a Project and specify a note. When finished, click the Save button.

View Time Report

Reports → Standard Reports

Past Period View As HTML (regular) Future Period

[Modify this report](#)

My TimeSheet

Time Records from Sunday, July 25, 2010 through Saturday, July 31, 2010

Date	User	Activity	Pay Type	Bill Type	Project	Comment	Hours
Monday, July 26, 2010	4, u	Coding	Regular	Standard	P1: Task 1	clean up	6.00
Monday, July 26, 2010	4, u	Design/Plan	Regular	Billable	P1: Task 2	initial planning	2.50
<i>Subtotal 07/26/2010</i>							<i>8.50</i>
Tuesday, July 27, 2010	4, u	Coding	Regular	Standard	P1: Task 1	clean up	4.25
<i>Subtotal 07/27/2010</i>							<i>4.25</i>
Grand Total							12.75

Signature: _____

Figure 29.8. Time Report

This report displays information regarding the time records that have been saved for this time period. The top of the report screen includes four buttons for manipulating the Time Report. The Past Period and Future Period buttons allow you to view reports for periods in the past or future. The View As button allows you to see the Time Report in different formats depending on your needs. You can view a version of this report that has been formatted for printing. You can also view a tab-delimited file that can be saved from your browser and imported into Excel or any other program that works with tab-delimited files. You can also run a Cube Report and have this data export directly into Excel. For more on this and other reports in the system, please see the Reports section of this manual.

Sheet History

Sheet History

View sheet transactions and add comments to the sheet history.

Enter Comments..

Refresh

Submit Comment

Hide System Notes

Type: time Period: 07/25/2010 - 07/31/2010 User: u1 State: **APPROVED**

Creation Date	Creation Time	Creator	Creator Login	Notes
Monday, July 26, 2010	09:55	System	-----	Initial Creation - User: 1, u (u1)
Monday, July 26, 2010	10:40	System	-----	Submitted for Approval - User: meredith (meredith)
Monday, July 26, 2010	10:40	System	-----	Created Approval Track for Project P1: Task 2 - User: meredith (meredith)
Monday, July 26, 2010	10:40	System	-----	Created Approval Track for Project P1: Task 1 - User: meredith (meredith)
Monday, July 26, 2010	11:17	System	-----	Approved for Level 1 - User: meredith (meredith)
Monday, July 26, 2010	11:18	System	-----	Approved for project:"P1: Task 1" level:1 by:"meredith" - User: meredith (meredith)
Monday, July 26, 2010	11:18	System	-----	Approval complete for project "P1: Task 1" - User: meredith (meredith)
Monday, July 26, 2010	11:18	System	-----	Approved for project:"P1: Task 2" level:1 by:"meredith" - User: meredith (meredith)
Monday, July 26, 2010	11:18	System	-----	Approval complete for project "P1: Task 2" - User: meredith (meredith)
Monday, July 26, 2010	11:18	System	-----	All approvals completed. - User: meredith (meredith)

Period Approval Information

Approval Levels: 1 Status: **Approved**

Level	Primary Approver Login	Primary Approver Fullname	Backup Approver Login	Backup Approver Fullname	Status
1	pm1	1, pm	None	None	Approved

Figure 29.9. Sheet history

Sheet History contains notes regarding the timesheet and the approval process for that specific timesheet. The Sheet History link is located in the Additional Options section at the bottom of your timesheet. Clicking the Sheet History link will launch a pop-up window containing all the actions associated with the timesheet to date. You can insert a note in the sheet history (i.e., for approvers) by specifying the text in the available textbox and clicking the Submit Comment button. To view more details click the Show System Notes button. This will display the system notes that correspond to the actions associated with the timesheet. To hide the system notes, you can click the Hide System Notes button.

Accruals



Pay Type	Type	Hours Left
Family Leave	Soft	24.00
Vacation	Hard	80.00

Figure 29.10. Accruals

Accruals are used to manage hour count balances for such things as vacation, sick leave, family leave, etc. If your manager has provided accrual balances for you, an Accruals link will be shown in the upper right corner of your timesheet. Hovering over this link will display all the accruals that have been assigned to you along with the type of accrual and remaining hour count balances. A soft accrual type will allow you to exceed the hour count balance when entering time taken. A hard accrual type will not allow you to exceed the hour count balance allocated to you.

Submitting Timesheet for Approval

From your timesheet, you can click the Submit for Approval button to submit your timesheet to your supervisor. This button will only appear on your timesheet if your company is using Approval Plans and if you have an approval plan assigned to you. Once a timesheet has been submitted for approval, you may not alter any of the time records contained in that timesheet. Therefore, do not submit your timesheet until you have finished all time entry for the time period in question. For more information on the Approvals process, please see the Approvals section of this manual.

Time Entry Corrections

Administrators and users whose role includes the Corrections ability may make changes to time records contained in a timesheet that has already been approved by a Sheet Approval process or Project Approval process. Once a timesheet has been approved, the Save Corrections button will appear on the timesheet. When this button is present, corrective entries can be made and then submitted for approval.

To make corrective entries for a prior period, a user who has the Corrections role ability should navigate to the timesheet in question and enter corrective entries as needed. Corrective time entry includes the concept of negative entry, because the existing records are approved and committed so they cannot be directly edited. Therefore negative records must be entered against the same Project, Task, Pay Type, Bill Type, and Comment to reduce the actual hours logged to the proper number.

Corrective Entry Example

Buck submitted his timesheet with 6 hours logged to Project A and 2 hours logged to Project B on Tuesday. After the timesheet was approved, Buck realized that he actually only worked 4 hours on Project A and also worked 2 hours on Project C on Tuesday.

Buck opens his timesheet for the time period in question and prepares to make corrective entries.

Buck prepares a subtractive correction entry the same way he would prepare a normal entry, by selecting the Project, Task, Pay Type, Bill Type, and Comment to be logged. In the case of correcting his hour overage on Project A, Buck carefully chooses the exact combination of these factors, including duplicating the comment field exactly, that comprised the original record. Buck then enters -2 (minus 2) hours for Project A on Tuesday.

Buck creates an additive correction entry the same way he would prepare a normal entry, by selecting the Project, Task, Pay Type, Bill Type, and Comment to be logged. To add the missing two hours for Project C, Buck creates the record 'from scratch' as though he were entering time normally and enters 2 hours for Project C on Tuesday.

Buck's timesheet now contains the following records for Tuesday:

- The original 6 hour record for Project A
- The original 2 hour record for Project B
- The corrective -2 hour record for Project A
- The corrective +2 hour record for Project C

If Buck has any other corrections to make, he should make them now. Once Buck has added and subtracted hours as needed from his timesheet, Buck should click the Save Corrections button located at the bottom of his screen. The corrected timesheet will now flow through the approvals process that a normal 'new' timesheet would follow. If further corrections are required, the timesheet will either be rejected through the approvals process and returned for direct editing of the corrective entries or the timesheet will need to be accessed for a new round of corrective entries after it has been completely approved.

Historical Timesheets

Your past and present timesheets can be viewed under Time→Time Sheets→All Time Sheets (see figure 29.11). Here you will see a list of timesheets with their relevant periods. You can view the details of the timesheet by clicking the link labeled 'Click to View'.



Time → Time Sheets → All Time Sheets			
Timesheets			
Time Period	Status	Total	View
07/25/2010 - 07/31/2010	Approved	42.00	Click to View 07/25/2010 - 07/31/2010
07/18/2010 - 07/24/2010	Open for Entry	12.00	Click to View 07/18/2010 - 07/24/2010
07/11/2010 - 07/17/2010	Approved	40.00	Click to View 07/11/2010 - 07/17/2010

Figure 29.11. Historical timesheets

Requesting Leave

Leave Requests are dates that you have requested for time off. You can view your total pending, approved and declined requests under Leave→My Requests. Pending requests will show up as a red number next to the Leave menu. Clicking through the menu will direct you to the My Leave Requests section (see figure 29.12). Here, you can view all your pending, approved and declined Leave Requests. You also have the option to delete pending and approved requests that will not be used. To delete a pending or approved Leave Request, select the requests to delete and click the Delete button.

Leave → My Requests → All Leave Requests

Search

User Comment or Approve/Decline Comment contains

Request Status: Pending, Approved, Declined

In Date Range: 08/12/2010, 21 Begin, 21 End

Pay Type: is anything, Family Leave, Holiday, Jury Duty, Military Duty

Project: is anything, P1: Task 1, P1: Task 2, Project 1, root

Search

Search Results Showing 1 - 4 of 4 leave requests Results Per Page: 10 Go

Status	Date	Hours	User Comment	Approver/Decliner with Comment	Project	Activity	Pay Type	Bill Type
Approved	Thursday, August 12, 2010	8.0		meredith (meredith)	root	Clerical	Family Leave	Billable
Approved	Friday, August 13, 2010	8.0		meredith (meredith)	root	Clerical	Family Leave	Billable
Approved	Thursday, August 26, 2010	8.0		meredith (meredith)	root	Clerical	Family Leave	Billable
Declined	Friday, August 27, 2010	8.0		meredith (meredith): Others are already out.	root	Clerical	Family Leave	Billable

0 selected Select All Results Per Page: 10 Go

Delete Create

Figure 29.12. My Leave Requests

To request time off, click the Create button. This will direct you to the Request Time Off screen where you can specify the dates and hours per day that you wish to take off. You can also select a Project, Task, Pay Type, Bill Type, and Comment. The Pay Type will contain the Accrual that you will need to select to identify the type of Leave that you are requesting. If the new request exceeds the current accrual balance less existing leave requests, you will receive a warning when you submit the new request. Finally, you can select the persons that you wish to notify for approval of the Leave Request. When finished, click the Submit Request button.

You can also view your Leave Requests and request leave on a calendar under Leave→My Calendar (see figure 29.13). Annual and monthly views show summary information, while weekly and daily views include the details of each request.



Figure 29.13. My Leave Calendar

Leave Request Management

If you have Manager or Approval Plan authority over other users in the system, you will have access to Leave Calendar and Manage Leave Requests under the Leave menu. These areas allow you to search for, view and approve/decline all leave requests for the users in your groups or approval plans. Roles with Reporter authority can view the requests for users in their groups, but they will not see options to approve or decline them.

The Leave Management Calendar includes annual and monthly views which show summary information, as well as weekly and daily views which include the details of each request. Hovering your mouse over the totals for a given day in the monthly view will display the names of the users and the amount of leave they have requested.

Stopwatch Entry

If your administrator has given you access to a Stopwatch screen, you can time your work under Time→Stopwatch Entry (see figure 29.14). Stopwatch is an optional timer for users who want to keep track of specific tasks as they start and stop them. The times are automatically filled in (as total hours or in/out times) on the user's standard Time Entry screen. Depending upon your screen configuration, you may need to select your details from the drop down lists before or after you've completed a task. If your screen is configured to set the details before you begin a task (on the "punch in"), you will see Pause and Resume buttons on your screen. You have the option to start timing a new task by selecting details from the drop down lists and clicking on Start/Start New or on the red button next to a Memorized Entry. When you have completed the first task, you can either Stop it or select new details and click on the Start/Start New button. This will stop the previous task and

start the new one in a single step. You also have the option to Pause a task in the event of an interruption. You can then Resume the task without selecting the details again.

Time → Stopwatch Entry

✓

User u5 completed a task: Tue Jul 27 14:40:03 2010. Elapsed time: 0:00:19

Project

Activity

Comment

root

Other

Start/Start New

Memorized Entries for 5, u

Project	Activity	Comment	User/Group
P1: Task 2	Meetings		u5

Last 1 days worth of punches for 5, u (u5).

PUNCH	Punch Time	Project	Activity	Comment
IN	Tue Jul 27 14:34:43 2010	P1: Task 1	Coding	clean up
OUT	Tue Jul 27 14:40:03 2010			


Time (0:05:20)

Figure 29.14. Stopwatch Entry

Stopwatch entry is optional and does not enforce the capture of in and out times. If documenting in/out times is required for your business, please use an "allocation" Time Entry screen with a punch clock or a simple Punch Entry screen.

Expense Entry


Managing Expense Entries

Expense Entry is located under Expense→Standard Expense Entry (see figure 30.1). Expense Entry allows you to input your business related expenses on a single sheet. You can view your expenses for a single day or an entire period. Expense Entry displays the period view by default. To enter expenses for a period, go to Viewing by Period. To enter or view expenses for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons  to move backward or forward one period at a time. To enter expenses for a single day, go to Viewing by Day. To enter or view expenses for a different day, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons to move backward or forward one day at a time.


Project	Expense Code	Source	Currency	Comment	Sun 07/25	Mon 07/26	Tue 07/27	Wed 07/28	Thu 07/29	Fri 07/30	Sat 07/31
P1: Task 1	Car Rental	Employee	US\$	CA trip		65.99					65.99
New											
root	Miscellaneous	Company	US\$								0.00
root	Miscellaneous	Company	US\$								0.00
root	Miscellaneous	Company	US\$								0.00
root	Miscellaneous	Company	US\$								0.00
					0.00	65.99	0.00	0.00	0.00	0.00	65.99


Figure 30.1. Expense Entry

Keep in mind that expense sheets are configurable by administrators so your expense sheet may vary in appearance and functionality from the one shown. For example, certain column headers in your expense sheet such as Project, Expense Code, Source, Currency and Comment may be hidden or may be renamed altogether.

Your administrator has already setup your expense sheet to let you log expenses during a particular period or date range. Expense sheet periods are typically a week, month, or pay period, depending on how your company prefers to track expenses. To enter expenses or view expenses for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons  located at the top of the expense sheet around the date, to move backward or forward one period at a time.

Standard expense sheets will typically let you select a Project, Expense Code, Source, and Currency. To create an expense entry, select a value from each of the dropdowns shown on your expense sheet. You can also specify a Comment for the expense entry. Once selected, you can then specify the expense amount for that project on a specific date.

To edit an expense entry on your expense sheet, click the Edit Icon  to the left of the respective entry. This will refresh the screen and allow you to change the Project, Expense Code, Source, and Currency. You may also modify your Comment associated with the entry.


To delete an expense entry from your expense sheet, you can simply click the Delete Icon  located to the right of the respective entry. The screen will refresh with the expense entry having been deleted.

When finished creating, editing, and removing expense entries, click the Save button.

Searching and Selecting Project

There are four ways to select a project when managing expense entries. You can use the expandable Project Tree, the Inline Tree in the Project dropdown, Project Search, or the My Projects List.

Project Tree

The first method allows you to select a project from a hierarchical tree that contains all the projects to which you have been granted access, as well as some of the parent projects that are required for drilling down into the hierarchy. To view the tree, click the Project Tree Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing a navigable project tree with expanding and collapsing nodes (see figure 30.2). To open a node and view all child projects, click the expand node. To close a node and hide all child projects, click the collapse node. When you have found the project that you wish to log expenses to, select the project and then click the Done button. This will close the pop-up window and the project you selected should appear in the Project dropdown.

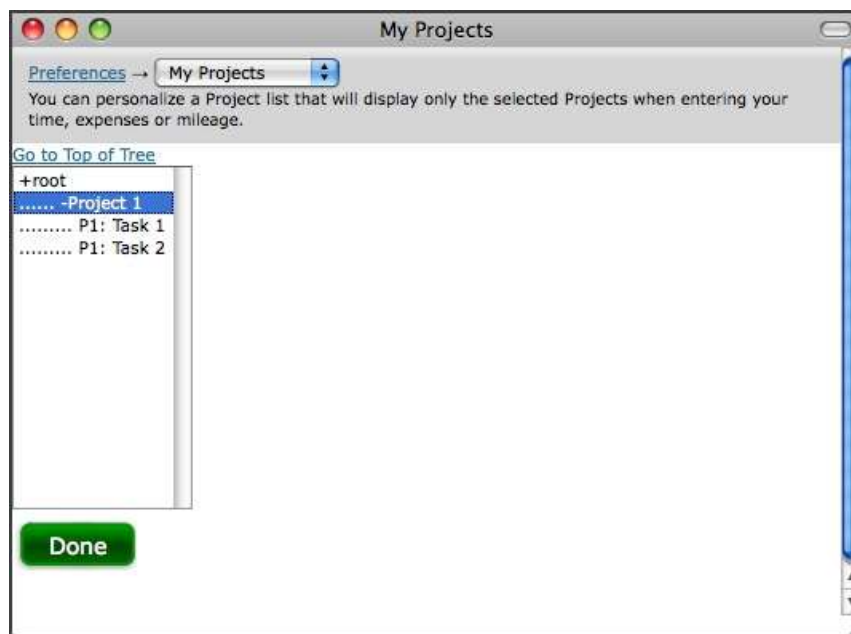



Figure 30.2. Project tree

Inline Tree in Dropdown

The second method allows you to drill down into the project hierarchy using a project tree that is included in the project dropdown itself. If your administrator has set up your expense sheet to include this option, you can navigate down through the hierarchy of projects by clicking on selections directly in the Project dropdown. After each selection, the next level in the hierarchy is displayed. The final selection that is made prior to save determines the project to which expenses will be logged.

Project Search

The third method allows you to specify search criteria and select a project from the search results. To do a project search, click the Project Search Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing search criteria (see figure 30.3). Specify the project name or description for the project that you are searching for. As you type, you will see returned search results below the search criteria. From the search results, you can select the project that you wish to log hours for. When you select the project, the pop-up window will automatically close and

the project you selected should appear in the Project dropdown menu. Additional search options can be selected by clicking on the arrow to expand the Search Options table.

Search Projects

Project name or description contains

Search Options

Group

is anything

All

Status

Loggable and Reportable

Project Parent

is anything

(2) Project 1

(1) root

Owner

is anything

1, pm

Backup Owner

is anything

1, pm

P1: Task 1

Task 1 for Project 1

P1: Task 2

Task 2 for Project 1

Project 1

Top of Project 1

root

Default Parent Project

Reset

Please enter a search term.

Page 1 of 1

Close

Figure 30.3. Project search

My Project List

You can maintain your own unique list of projects that will be displayed by default in the project dropdown. This will keep you from having to routinely search for or select a project from the project tree for projects that you frequently log expenses to. The My Projects link, located at the bottom of the timesheet will launch a pop-up window that can be used to add and remove projects from your unique Project List (see figure 30.4). You may add projects from the Available Projects list by selecting the project and clicking the Add button. These projects will be added to your Project List shown in the box to the right. To remove a project from your Project List, select the project and click the Remove button. You also have the ability to add and remove all projects to and from your Project List. When you are finished, click the Save button.

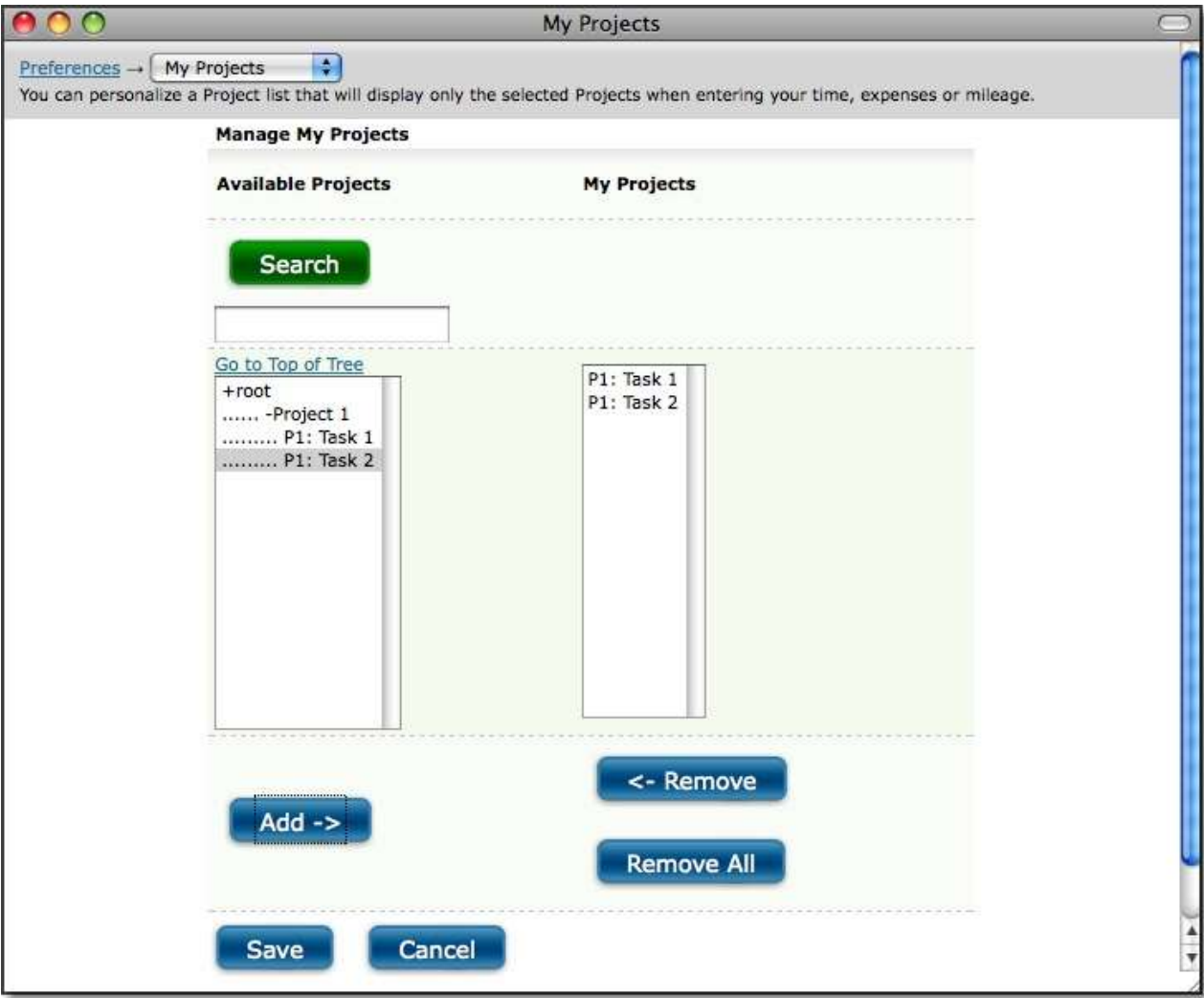



Figure 30.4. My Projects

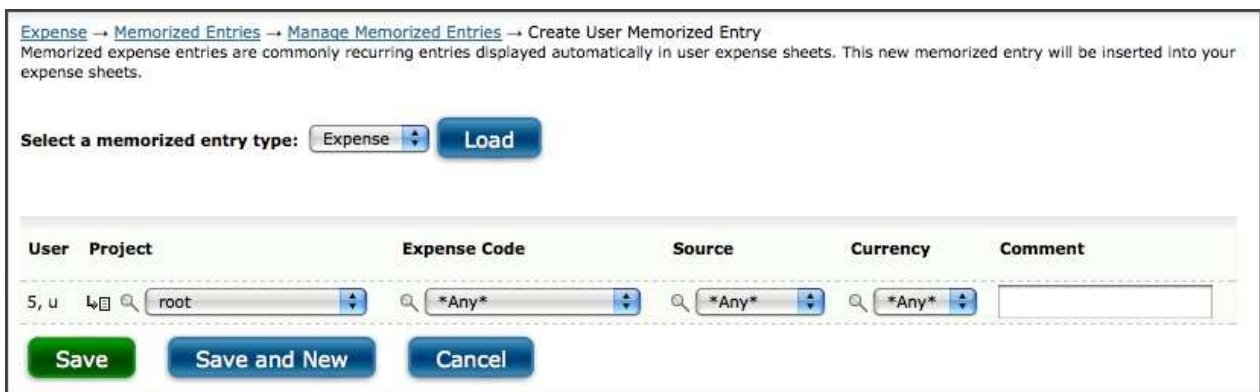
Memorized Entries

Memorized Entries allow you to save your most common expenses so that you do not have to repeatedly select them when entering expenses. A Memorized Entry contains a single

Project, Expense Code, Source, Currency, and Comment. After an entry has been memorized, it will appear in all your expense sheets thereafter. You then only need to specify the actual expense.

To create a Memorized Entry, select the appropriate Project, Expense Code, Source, Currency, and Comment, and then click the Save button. You can only create a Memorized Entry after that entry has been saved in your expense sheet. After the entry has been saved, you will see the Memorize Icon  to the right of the entry. Click the Memorize Entry Icon, review the contents of the entry as it is displayed on the User Memorized Entries screen, and click Save to preserve the entry. The information in that entry will be memorized, except the expense, and will appear in all your expense sheets thereafter. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank.

Alternatively, you may create a Memorized Entry by going to Expense→Memorized Entries→Create Memorized Entry (see figure 30.5). Select a Project, Expense Code, Source, Currency, and Comment. When finished, click the Save button. The entry will be memorized and will appear in all your expense sheets.



Expense → Memorized Entries → Manage Memorized Entries → Create User Memorized Entry

Memorized expense entries are commonly recurring entries displayed automatically in user expense sheets. This new memorized entry will be inserted into your expense sheets.

Select a memorized entry type: Expense Load

User	Project	Expense Code	Source	Currency	Comment
5, u	root	*Any*	*Any*	*Any*	


Save Save and New Cancel

Figure 30.5. Memorized Expense Entries

To manage existing Memorized Entries, go to Expense→Memorized Entries→Manage Memorized Entries. This screen will show you all the Memorized Entries that you have stored in the system. These are all the Memorized Entries that appear in your timesheets. You can change the Project, Expense Code, Source, Currency, and Comment for the respective Memorized Entry that you want to modify. When finished, click the Save button. To delete a Memorized Entry from your expense sheet, select the Memorized Entries to delete and click the Delete button.

Project Entry Notes

The system allows you to create Project Notes for any expense record within an expense entry. Project Notes provide a way for you to record complex comments and information for expenses logged to a project over the course of an expense period. You can create a Project

Note for a specific expense record by clicking the Project Note icon  located immediately to the right of a saved expense on your expense sheet. Again, the expense entry must

already be saved in the system before you will see the yellow note appear. Clicking on the note will launch a pop-up window, which can be used to create, edit, or delete Project Notes (see figure 30.6).

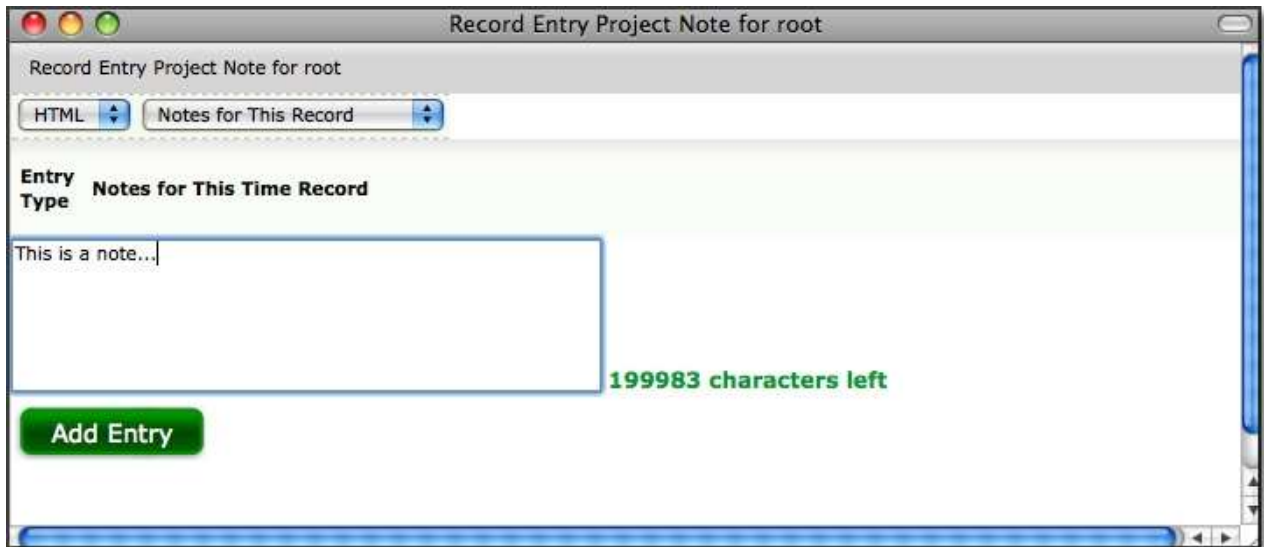


Figure 30.6. Project Notes

You can also manage Project Notes under Preferences→Project Notes. You can view existing Project Notes by specifying the search criteria and date range and then clicking the Search button. The search results of Project Notes will be displayed below the criteria. To create a new Project Note, go to the 'Create a New Project Note' section. Select a Project and specify a note. When finished, click the Save button.

Sheet History

The screenshot shows a window titled "Sheet History" with a subtitle "View sheet transactions and add comments to the sheet history." It includes a text input field for comments, three buttons (Refresh, Submit Comment, Hide System Notes), and a table of transactions. Below the table is a section for "Project Approval Information" showing the project status as "Pending Approval" and a table of approvers.

Creation Date	Creation Time	Creator	Creator Login	Notes
Tuesday, July 27, 2010	14:41	System	-----	Initial Creation - User: 5, u (u5)
Tuesday, July 27, 2010	15:01	System	-----	Submitted for Approval - User: 5, u (u5)
Tuesday, July 27, 2010	15:01	System	-----	Created Approval Track for Project P1: Task 1 - User: 5, u (u5)

Project Approval Information

Project: "P1: Task 1" Status: **Pending Approval**

Level	Approver Login	Approver Fullname	Status
1	pm1	1, pm	Awaiting Approval

Figure 30.7. Sheet history

Sheet History contains notes regarding the expense sheet and the approval process for that specific expense sheet. The Sheet History link is located in the Additional Options section at the bottom of your expense sheet. Clicking the Sheet History link will launch a pop-up window containing all the actions associated with the expense sheet to date. You can insert a note in the sheet history (i.e., for approvers) by specifying the text in the available textbox and clicking the Submit Comment button. To view more details click the Show System Notes button. This will display the system notes that correspond to the actions associated with the expense sheet. To hide the system notes, you can click the Hide System Notes button.

Attaching Expense Receipts

You can attach receipt images of expenses that you incurred during the period of your expense sheet. Click the View/Upload Receipt Images button located at the bottom of your expense sheet. This will prompt a pop-up window that will allow you to attach your receipts (see figure 30.8). Click the Browse button to search and select your attachment file (see figure 30.9). You are limited to one attachment file per expense entry.



Figure 30.8. Upload receipt image



Figure 30.9. Browse for receipt image

Uploading Expense Records

You can import a Quicken Interchange Format file (.qif), standard for bank statements and credit card files, containing your expenses for that period by clicking the Upload Expenses button. This will prompt a pop-up window allowing you to select the .qif file to import into the system (see figure 30.10). Select the file by clicking the Browse button. When complete, click the Import button. You will be presented with all the records in your file along with the option to choose individual records and set the Project, Expense Code, Currency, and Comment for each record. The Source and Read-Only Comment will be automatically included in each entry as a result of the import. Once you have selected your records and set all of the details, you can click on the Save button. This will close the pop-up window and your expense sheet will contain the expenses you selected in your .qif file. Expenses in .qif files can only be selected on the expense sheet that corresponds to the same period as the expense record.



Figure 30.10. Upload expense records

Submitting Expense Sheet for Approval

From your expense sheet, you can click the Submit for Approval button to submit your expense sheet to your supervisor. This button will only appear on your expense sheet if your company is using Approval Plans and you have an approval plan assigned to you. Once an expense sheet has been submitted for approval, you may not alter any of the expense records contained in that expense sheet. Therefore, do not submit your expense sheet until you have finished all expense entry for the time period in question. For more information on the Approvals process, please see the Approvals section of this manual.

Expense Entry Corrections

Administrators and users whose role includes the Corrections ability may make changes to records contained in an expense sheet that have already been approved by a Sheet Approval process or Project Approval process. Once an expense sheet has been approved, the Save Corrections button appears on the expense sheet. When this button is present, corrective entries can be made and then submitted for approval.

To make corrective entries for a prior period, a user who has the Corrections role ability should navigate to the expense sheet in question and enter corrective entries as needed. Corrective expense entry includes the concept of negative entry, because the existing records are approved and committed so they cannot be directly edited. Therefore negative records must be entered against the same Project, Expense Code, Source, Currency, and Comment to reduce the actual value logged to the proper number.

Corrective Entry Example

Buck submitted his expense sheet with \$60 logged to Project A and \$20 logged to Project B on Tuesday. After the expense sheet was approved, Buck realized that he actually only spent \$40 on Project A and also spent \$20 on Project C on Tuesday. Buck opens his expense sheet for the expense period in question and prepares to make corrective entries.

Buck prepares a subtractive correction entry the same way he would prepare a normal entry, by selecting the Project, Expense Code, Source, Currency, and Comment to be logged. In the case of correcting his overage on Project A, Buck carefully chooses the exact combination of these factors, including duplicating the comment field exactly, that comprised the original record. Buck then enters -20 (minus 20) for Project A on Tuesday. Buck creates an additive correction entry the same way he would prepare a normal entry, by selecting the Project, Expense Code, Source, Currency, and Comment to be logged. To add the missing expense for Project C, Buck creates the record 'from scratch' as though he were entering expense normally and enters \$20 for Project C on Tuesday. Buck's expense sheet now contains the following records for Tuesday:

The original \$60 record for Project A

The original \$20 record for Project B

The corrective -\$20 record for Project A

The corrective +\$20 record for Project C

If Buck has any other corrections to make, he should make them now. Once Buck has added and subtracted values as needed from his expense sheet, Buck should click the Save Corrections button located at the bottom of his screen. The corrected expense sheet will now flow through the approvals process that a normal 'new' expense sheet would follow.

If further corrections are required, the expense sheet will either be rejected through the approvals process and returned for direct editing of the corrective entries or the expense sheet will need to be accessed for a new round of corrective entries after it has been completely approved.

Historical Expense Sheets


Your past and present expense sheets can be viewed under Expense→Expense Sheets→All Expense Sheets (see figure 30.11). Here you will see a list of expense sheets with their relevant periods. You can view the details of the expense sheets by clicking the link labeled 'Click to View'.

Expense → Expense Sheets → All Expense Sheets			
Expense sheets			
Time Period	Status	Total	View
07/25/2010 - 07/31/2010	Open for Entry	450.47	Click to View 07/25/2010 - 07/31/2010
07/18/2010 - 07/24/2010	Submitted for Approval	50.00	Click to View 07/18/2010 - 07/24/2010

Figure 30.11. Historical expense sheets

Mileage Entry

Managing Mileage Entries

Mileage Entry is located under Mileage→Standard Mileage Entry (see figure 31.1). Mileage Entry allows you to input your business related expenses on a single sheet. You can view your mileage for a single day or an entire period. Expense Entry displays the period view by default. To enter expenses for a period, go to Viewing by Period. To enter or view expenses for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons  to move backward or forward one period at a time. To enter expenses for a single day, go to Viewing by Day. To enter or view expenses for a different day, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icons to move backward or forward one day at a time.

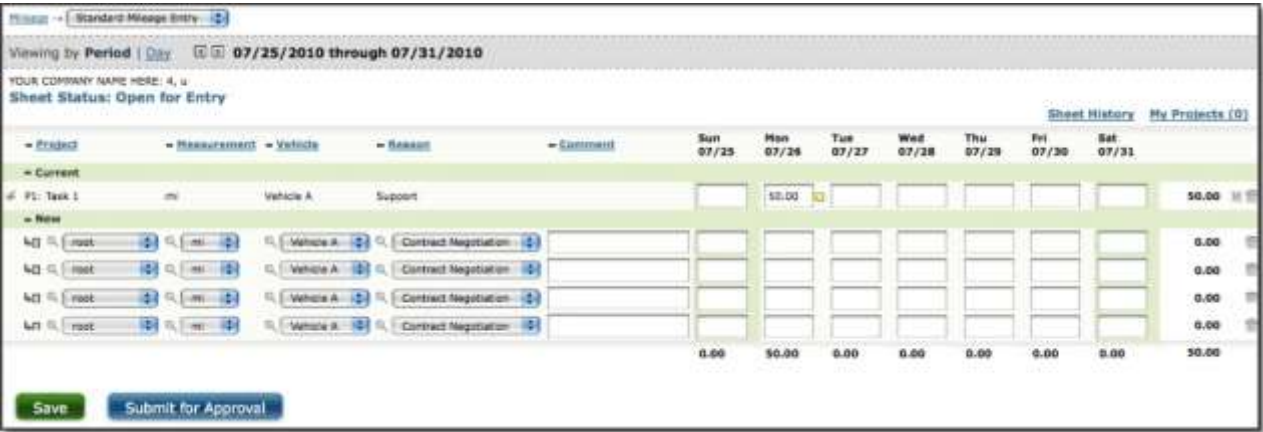




Figure 31.1. Mileage Entry


Keep in mind that mileage sheets are configurable by administrators so your mileage sheet may vary in appearance and functionality from the one shown. For example, certain column headers in your mileage sheet such as Project, Reason, Measurement, and Vehicle may be hidden or may be renamed altogether.

Your administrator has already setup your mileage sheet to let you log mileage for a particular period or date range. Mileage sheet periods are typically a week, month, or pay period, depending on how your company prefers to track mileage. To enter mileage or view mileage entries for a different period, you can use the Calendar in the login bar in the upper right corner to jump to a particular date. Alternatively, you may use the Date Arrow Icon  to move backward or forward one period at a time.

Standard mileage sheets will typically let you select a Project, Travel Reason, Measurement Unit, and Vehicle. To create a mileage entry, select a value from each of the dropdowns

shown on your mileage sheet. You may also specify a Comment for the mileage entry. Once selected, you can then input the distance traveled for that project on a specific date.

To edit a mileage entry on your mileage sheet, click the Edit Icon  to the left of the respective entry. This will refresh the screen and allow you to change the Project, Reason, Measurement, and Vehicle. You can also modify your Comment associated with the entry.


To delete a mileage entry from your mileage sheet, you can simply click the Delete Icon  located to the right of the respective entry. The screen will refresh with the mileage entry having been deleted.

When finished creating, editing, and removing mileage entries, click the Save button.

Searching and Selecting Project

There are four ways to select a project when managing mileage entries. You can use the expandable Project Tree, the Inline Tree in the Project dropdown, Project Search, or the My Projects List.

Project Tree

The first method allows you to select a project from a hierarchical tree that contains all the projects to which you have been granted access, as well as some of the parent projects that are required for drilling down into the hierarchy. To view the tree, click the Project Tree Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing a navigable project tree with expanding and collapsing nodes (see figure 31.2). To open a node and view all child projects, click the expand node. To close a node and hide all child projects, click the collapse node. When you have found the project that you wish to log mileage to, select the project and then click the Done button. This will close the pop-up window and the project you selected should appear in the Project dropdown.

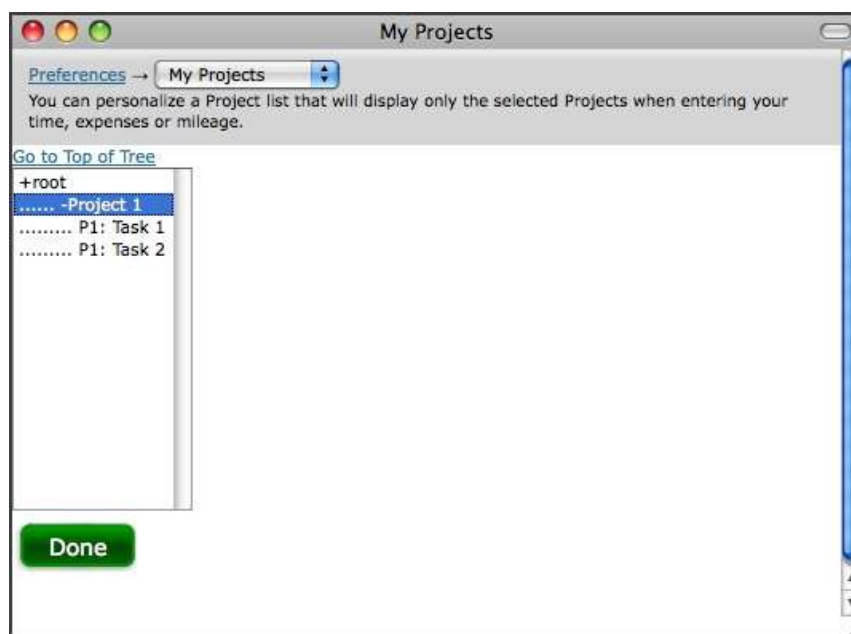



Figure 31.2. Project tree

Inline Tree in Dropdown

The second method allows you to drill down into the project hierarchy using a project tree that is included in the project dropdown itself. If your administrator has set up your mileage sheet to include this option, you can navigate down through the hierarchy of projects by clicking on selections directly in the Project dropdown. After each selection, the next level in the hierarchy is displayed. The final selection that is made prior to save determines the project to which mileage will be logged.

Project Search

The third method allows you to specify search criteria and select a project from the search results. To do a project search, click the Project Search Icon  located to the left of the respective Project dropdown. This will launch a pop-up window containing search criteria (see figure 31.2). Specify the project name or description for the project that you are searching for. As you type, you will see returned search results below the search criteria. From the search results, you can select the project that you wish to log hours for. When you select the project, the pop-up window will automatically close and the project you selected should appear in the Project dropdown menu. Additional search options can be selected by clicking on the arrow to expand the Search Options table.

Search Projects

Project name or description

contains

Search Options

Group

is anything

All

Status

Loggable and Reportable

Project Parent

is anything

(2) Project 1

(1) root

Owner

is anything

1, pm

Backup Owner

is anything

1, pm

P1: Task 1

Task 1 for Project 1

P1: Task 2

Task 2 for Project 1

Project 1

Top of Project 1

root

Default Parent Project

Reset

Please enter a search term.

Page 1 of 1

Close

Figure 31.2. Project search

My Project List

You can maintain your own unique list of projects that will be displayed by default in the project dropdown. This will keep you from having to routinely search for or select a project from the project tree for projects that you frequently log mileage to. The My Projects link, located at the bottom of the timesheet will launch a pop-up window that can be used to add and remove projects from your unique Project List (see figure 31.4). You may add projects from the Available Projects list by selecting the project and clicking the Add button. These projects will be added to your Project List shown in the box to the right. To remove a project from your Project List, select the project and click the Remove button. You also have the ability to add and remove all projects to and from your Project List. When you are finished, click the Save button.

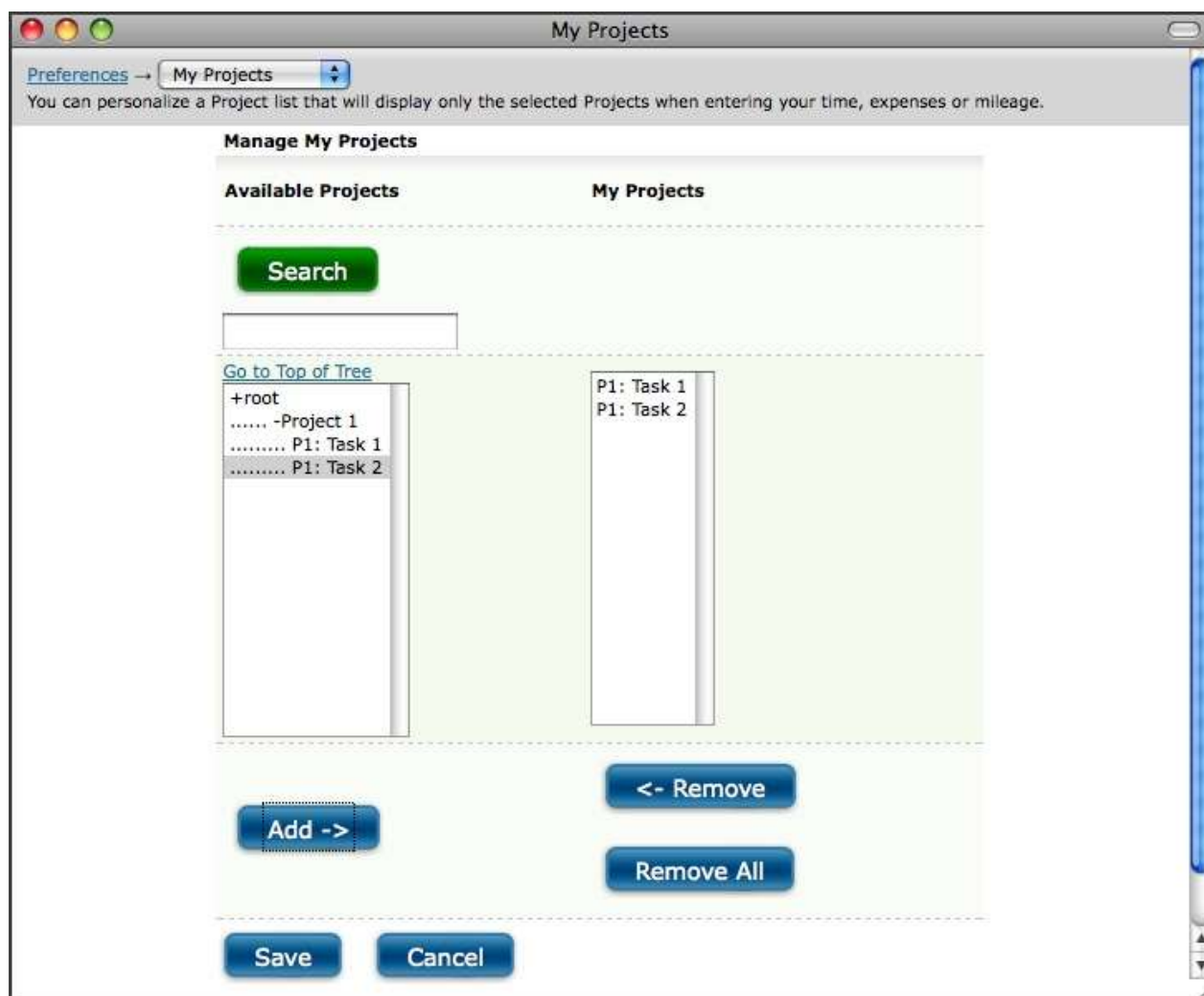



Figure 31.4. My Projects

Memorized Entries

Memorized Entries allow you to save your most common travel so that you do not have to repeatedly select them when entering mileage. A Memorized Entry contains a single Project, Measurement, Vehicle, Reason, and Comment. After an entry has been memorized, it will appear in all your mileage sheets thereafter. You then only need to specify the mileage.

To create a Memorized Entry, select the appropriate Project, Measurement, Vehicle, Reason, and Comment, and then click the Save button. You can only create a Memorized Entry after that entry has been saved in your mileage sheet. After the entry has been saved, you will see the Memorize Icon  to the right of the entry. Click the Memorize Entry Icon, review the contents of the entry as it is displayed on the User Memorized Entries screen, and click Save to preserve the entry. The information in that entry will be memorized, except the actual distance, and will appear in all your mileage sheets thereafter. You can also memorize part of an entry by using the wildcards feature. Selecting the 'any' value from the

appropriate dropdown will not memorize that field. The same is true when leaving the Comment field blank.

Alternatively, you may create a Memorized Entry by going to Mileage→Memorized Entries→Create Memorized Entry (see figure 31.5). Select a Project, Measurement, Vehicle, Reason, and Comment. When finished, click the Save button. The entry will be memorized and will appear in all your mileage sheets.

Mileage → Memorized Entries → Manage Memorized Entries → Create User Memorized Entry

Memorized mileage entries are commonly recurring entries displayed automatically in user mileage sheets. This new memorized entry will be inserted into your mileage sheets.

Select a memorized entry type:

Mileage

Load

User	Project	Measurement	Vehicle	Reason	Comment
4, u	<div>root</div>	<div>*Any*</div>	<div>*Any*</div>	<div>*Any*</div>	

Save


Save and New

Cancel

Figure 31.5. Memorized Mileage Entries

To manage existing Memorized Entries, go to Mileage→Memorized Entries→Manage Memorized Entries. This screen will show you all the Memorized Entries that you have stored in the system. These are all the Memorized Entries that appear in your mileage sheets. You can change the Project, Measurement, Vehicle, Reason, and Comment for the respective Memorized Entry that you want to modify. When finished, click the Save button. To delete a Memorized Entry from your mileage sheet, select the Memorized Entries to delete and click the Delete button.

Project Entry Notes

The system allows you to create Project Notes for any mileage record within an mileage entry. Project Notes provide a way for you to record complex comments and information for mileage logged to a project over the course of an mileage period. You can create a Project Note for a specific mileage record by clicking the Project Note icon  located immediately to the right of a saved mileage entry on your mileage sheet. Again, the mileage entry must already be saved in the system before you will see the yellow note appear. Clicking on the note will launch a pop-up window, which can be used to create, edit, or delete Project Notes (see figure 31.6).

Record Entry Project Note for root

HTML Notes for This Record

Entry Type Notes for This Time Record

This is a note...

199983 characters left

Add Entry

Figure 31.6. Project Notes

You can also manage Project Notes under Preferences→Project Notes. You can view existing Project Notes by specifying the search criteria and date range and then clicking the Search button. The search results of Project Notes will be displayed below the criteria. To create a new Project Note, go to the 'Create a New Project Note' section. Select a Project and specify a note. When finished, click the Save button.

Sheet History

Sheet History
View sheet transactions and add comments to the sheet history.

Enter Comments..

Refresh Submit Comment Hide System Notes

Type: mileage Period: 07/25/2010 - 07/31/2010 User: u4 State: SUBMITTED

Creation Date	Creation Time	Creator	Creator Login	Notes
Tuesday, July 27, 2010	15:07	System	-----	Initial Creation - User: 4, u {u4}
Tuesday, July 27, 2010	15:12	System	-----	Submitted for Approval - User: 4, u {u4}
Tuesday, July 27, 2010	15:12	System	-----	Created Approval Track for Project P1: Task 1 - User: 4, u {u4}

Project Approval Information

Project: "P1: Task 1" Status: Pending Approval

Level	Approver Login	Approver Fullname	Status
1	pm1	1, pm	Awaiting Approval

Figure 31.7. Sheet history

Sheet History contains notes regarding the mileage sheet and the approval process for that specific mileage sheet. The Sheet History link is located in the Additional Options section at the bottom of your mileage sheet. Clicking the Sheet History link will launch a pop-up window containing all the actions associated with the mileage sheet to date. You can insert a note in the sheet history (i.e., for approvers) by specifying the text in the available textbox and clicking the Submit Comment button. To view more details click the Show System Notes button. This will display the system notes that correspond to the actions associated with the mileage sheet. To hide the system notes, you can click the Hide System Notes button.

Submitting Mileage Sheet for Approval

From your mileage sheet, you can click the Submit for Approval button to submit your mileage sheet to your supervisor. This button will only appear on your mileage sheet if your company is using Approval Plans and you have an approval plan assigned to you. Once a mileage sheet has been submitted for approval, you may not alter any of the mileage records contained in that mileage sheet. Therefore, do not submit your mileage sheet until you have finished all mileage entry for the time period in question. For more information on the Approvals process, please see the Approvals section of this manual.

Mileage Entry Corrections

Administrators and users whose role includes the Corrections ability may make changes to records contained in a mileage sheet that have already been approved via either a Period

or Project Approvals process. Once a mileage sheet has been approved, the Save Corrections button will appear on the mileage sheet. When this button is present, corrective entries can be made and then submitted for approval.

To make corrective entries for a prior period, a user who has the Corrections role ability should navigate to the mileage sheet in question and enter corrective entries as needed. Corrective mileage entry includes the concept of negative entry, because the existing records are approved and committed so they cannot be directly edited. Therefore negative records must be entered against the same Project, Reason, Vehicle, Measurement, and Comment to reduce the actual value logged to the proper number.

Corrective Entry Example

Buck submitted his mileage sheet with 600 miles logged to Project A and 200 miles logged to Project B on Tuesday. After the mileage sheet was approved, Buck realized that he actually only drove 400 on Project A and also drove 200 on Project C on Tuesday. Buck opens his mileage sheet for the mileage period in question and prepares to make corrective entries.

Buck prepares a subtractive correction entry the same way he would prepare a normal entry, by selecting the Project, Reason, Vehicle, Measurement, and Comment to be logged. In the case of correcting his overage on Project A, Buck carefully chooses the exact combination of these factors, including duplicating the comment field exactly, that comprised the original record. Buck then enters -200 (minus 200) for Project A on Tuesday.

Buck creates an additive correction entry the same way he would prepare a normal entry, by selecting the Project, Reason, Vehicle, Measurement, and Comment to be logged. To add the missing mileage for Project C, Buck creates the record 'from scratch' as though he were entering mileage normally and enters 200 for Project C on Tuesday. Buck's mileage sheet now contains the following records for Tuesday:

The original 600 mile record for Project A

The original 200 mile record for Project B

The corrective -200 mile record for Project A

The corrective +200 mile record for Project C

If Buck has any other corrections to make, he should make them now. Once Buck has added and subtracted values as needed from his mileage sheet, he should click the Save Corrections button located at the bottom of his screen. The corrected mileage sheet will now flow through the approvals process that a normal 'new' mileage sheet would follow.

If further corrections are required, the mileage sheet will either be rejected through the approvals process and returned for direct editing of the corrective entries or the mileage sheet will need to be accessed for a new round of corrective entries after it has been completely approved.

Historical Mileage Sheets

Your past and present mileage sheets can be viewed under Mileage→Mileage Sheets→All Mileage Sheets (see figure 31.8). Here you will see a list of mileage sheets with their relevant periods. You can view the details of the mileage sheets by clicking the link labeled 'Click to View'.

Mileage → Mileage Sheets → All Mileage Sheets

Mileage sheets

Time Period	Status	Total	View
07/25/2010 - 07/31/2010	Submitted for Approval	50.00	Click to View 07/25/2010 - 07/31/2010
07/18/2010 - 07/24/2010	Open for Entry	50.00	Click to View 07/18/2010 - 07/24/2010
07/11/2010 - 07/17/2010	Open for Entry	0.00	Click to View 07/11/2010 - 07/17/2010

Figure 31.8. Historical mileage sheets